FaciliWorks® 8i

Web-based CMMS Administrator Guide

CyberMetrics®

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Web-based CMMS Administrator Guide

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Chapter One
Intro & Implementation Planning

Welcome to FaciliWorks

Welcome to FaciliWorks Enterprise Asset Management for Windows, a computerized maintenance management software (CMMS) program that gives you an easy-to-use, flexible system for scheduling, managing and tracking your maintenance tasks.

This Administrator Guide is intended to be used by supervisors and network administrators who will be responsible for leading the implementation of FaciliWorks. This guide includes instructions for setting up users, security and user-defined program settings and performing advanced system maintenance features. For more information about entering records into FaciliWorks, please consult the FaciliWorks 8i User Manual.

Training

Each FaciliWorks user should have a thorough understanding of the particular functions that he or she will use. It's not necessary for a user to learn FaciliWorks' tools and utilities if that user isn't going to have administrator rights. For this reason, instructions for these tools and utilities are included only in this guide. Keep in mind that some users may need training on basic computer and Windows functions.

CyberMetrics offers convenient and effective training options to fit your needs. Our talented instructors will guide you through the planning, preparation, setup and successful operation of FaciliWorks Enterprise Asset Management Software. You'll learn how to save time, avoid common mistakes and get the most out of your software. For more information about FaciliWorks training classes, please call CyberMetrics toll-free at 1-800-776-3090.

FaciliWorks Implementation Planning

As with any new record control system, be it computerized or manual, it is worthwhile to take the time to plan the implementation. Major steps to consider are:

1. Define your needs for the system.
2. Define when you want to start using FaciliWorks; set both long-term and short-term goals.
3. Choose system administrator(s).

Define Your Needs

The first step is to define what your needs are for your maintenance system and then determine how FaciliWorks can help you meet those needs. For example, you may need the system to:

- Maintain an inventory of all assets, tools and parts.
- Remind you when PM tasks are due.
- Maintain a complete history of all asset records, repair records and tool usage.
- Maintain a database of your maintenance procedures, asset suppliers and service providers.

Define a Time Line

Take the needs that you defined in step one and divide them into short-term and long-term needs (goals). Next, decide on a time frame for your short-term goals and begin working toward them. This will help you make FaciliWorks useful in the shortest possible time.

Short-term Needs

Short-term needs might include:

- Entering records for only active assets (items that are used currently or may be used in the near future).
- Entering only the most recent history of maintenance records.
- Setting up an internal asset identification numbering scheme (if you don't currently use one).

Long-term Needs

Long-term needs might include:

- Entering your compete inventory of assets (active, inactive and perhaps employee-owned items).
- Entering the complete history of maintenance records (perhaps going as far back as five years).
- Setting up maintenance procedures for on-line reference and control.
- Reviewing maintenance history and optimizing frequencies or scheduling methods (i.e., calendar-based versus meter-based schedules).
- Entering information about your asset and service suppliers.

Choose System Administrator(s)

To choose system administrator(s) (the person or group of people responsible for the system), answer these questions:

- Who will be responsible for the system?
- Who will install the program?
- Who will enter the records?
- Who will maintain and back up the data files?
- Who will take the inventory?

Once you answer these questions, you can decide who should lead your FaciliWorks implementation.

Data-building Strategy

Before you begin entering data into FaciliWorks, you should organize your data and formulate a plan for consistent data entry. You may want to categorize assets by type so that you can later quickly generate reports by type. You can also generate reports by asset description, so you may want to enter some common information for each kind of asset.

Instead, you may find it useful to devise an asset identification scheme that includes the type of asset. For example, an Asset ID that begins with a V indicates that the asset is a vehicle, T indicates a truck, HVAC indicates a facility or P1 indicates Plant 1.

Your Asset ID might also include the area where the asset is used, the cost center to which it belongs, the department responsible for it or any other useful information that would help you instantly identify it.

Asset Records

FaciliWorks allows an asset record to represent any item of value to your business, such as a vehicle, facility, building, pump or piece of equipment.

A pump and all its components could be included in a single asset record or the pump itself, motor, starter, etc. could each have its own asset record.

To determine which approach is best for your company, consider the following:

- Does each component need a separate history?
- Does each component need a separate part list?
- Are the components critical or expensive?

If so, you'll want to enter the pump and its components as separate asset records.

If you're going to manually enter your asset records, you should examine the order in which you process them. By using FaciliWorks' **Clone** function, you can save considerable time and avoid mistakes.

In a typical manufacturing environment, though many assets are used, there may only be a few different types of assets. The only differences between similar assets will be each one's ID number, serial number and location. They might also share the same maintenance tasks and procedures. If this is the case for your company, you can set up a boilerplate record of each asset type and then clone the boilerplate record when adding a new asset of the same type.

If you are responsible for centrally managing the records of several facilities (which may amount to thousands of asset records), then you might want to use multiple databases (to avoid waiting too long for records to process and for reports to generate).

Maintenance Tasks

Your data-building strategy should also include how you are going to handle maintenance tasks.

Should you create stand-alone or cumulative tasks for multiple frequencies, such as semiannual and annual tasks?

Does the annual task include the maintenance procedures of the semiannual or should you create both orders when they coincide once a year?

Data Collection

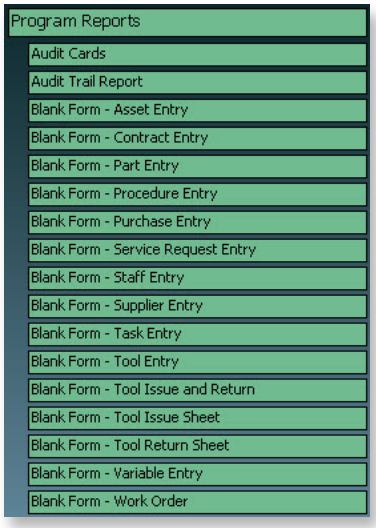
To begin entering your asset inventory into FaciliWorks, you'll need to either collect your existing records (such as paper files, cards and printouts) or create new records from scratch. If you're switching from another computer-based maintenance system, you may be able to import your records to FaciliWorks. FaciliWorks can import records from the application's standard excel-based templates. These templates can be obtained from the installation of the DTU program on the same CD as your FaciliWorks 8i software.

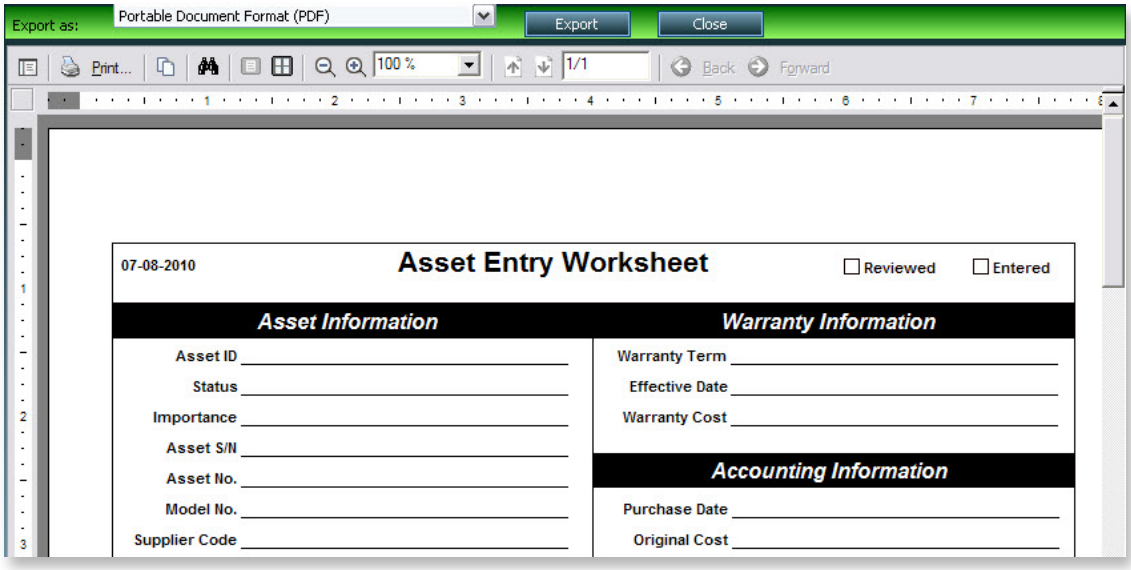
If your records are in a system that uses a proprietary file format, you may still be able to import your records by "printing" a report to a file or writing a software program to extract the records. CyberMetrics can be contracted to assist you with the import and record conversion process.

If you are unable to import records from another computer system and must manually enter your records from hard copy records, you can take this opportunity to carefully review your records for completeness and correctness. Questions that you need to answer include:

- Where is the existing information?
- How accurate is the data?
- Are walk-downs necessary to collect asset information?
- Should walk-downs cover all assets or only assets that lack complete, accurate information?
- Is the asset still located where it was when the original records were created?
- Instruct the data collection person or team on exactly what data to collect and enter. This eliminates the need to look at a record more than once.

FaciliWorks includes printable data collection worksheets that will allow you to compile organized, complete records to enter into FaciliWorks. Navigate to **Reports -> Program Reports** and select a worksheet.

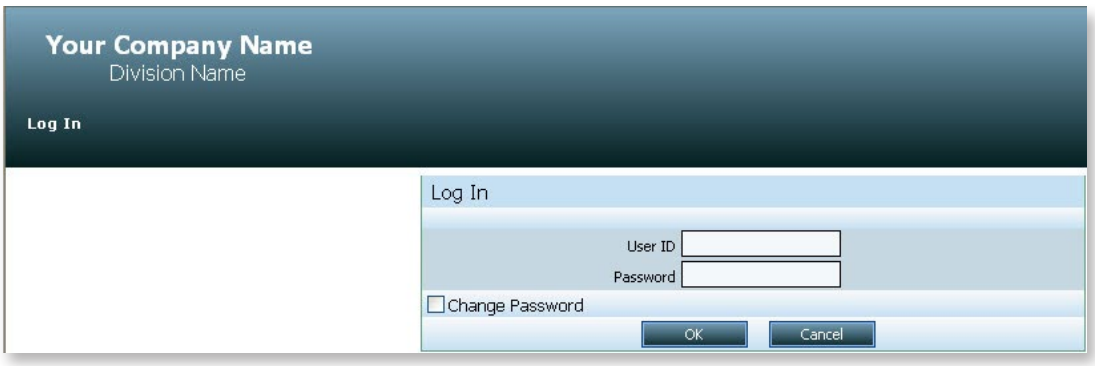

Program Reports
Audit Cards
Audit Trail Report
Blank Form - Asset Entry
Blank Form - Contract Entry
Blank Form - Part Entry
Blank Form - Procedure Entry
Blank Form - Purchase Entry
Blank Form - Service Request Entry
Blank Form - Staff Entry
Blank Form - Supplier Entry
Blank Form - Task Entry
Blank Form - Tool Entry
Blank Form - Tool Issue and Return
Blank Form - Tool Issue Sheet
Blank Form - Tool Return Sheet
Blank Form - Variable Entry
Blank Form - Work Order



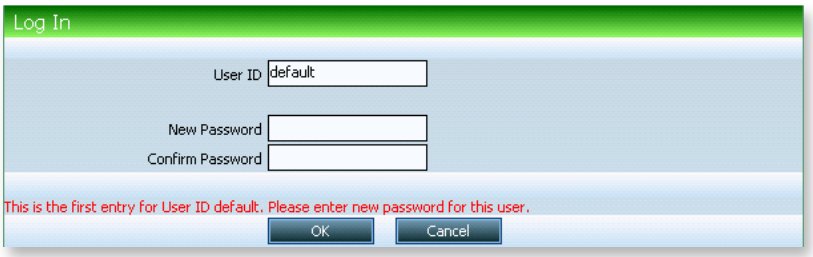
From this window, the worksheet can be printed or exported as a file.

Chapter Two
Launching FaciliWorks

1. Open Internet Explorer.
2. Enter the URL in the address field and press Enter.
3. The FaciliWorks **Log In** screen will appear.

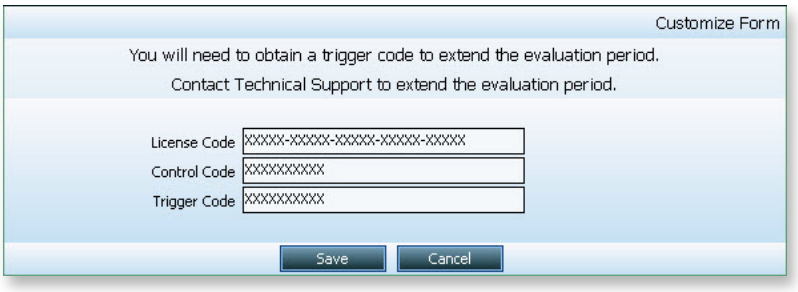


4. Enter your User ID and Password and click the **OK** button.
5. Upon first-time login, the following message will appear:



6. Enter a new password in both the **New Password** and **Confirm Password** fields. Press the Tab key on your keyboard (this activates the **OK** button) and then click **OK.**

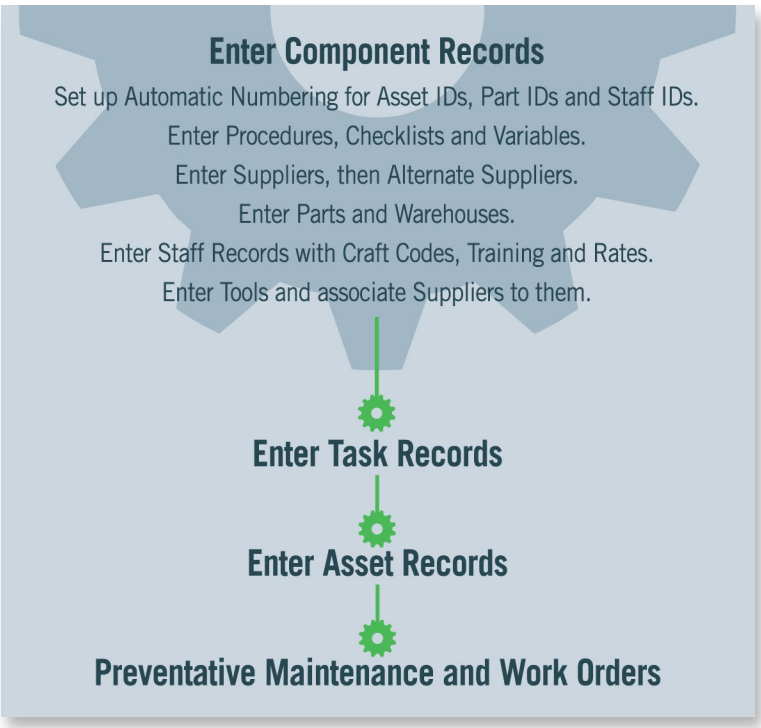
7. If a Trigger Code was not supplied prior to the first launch of FaciliWorks, you will receive a message about program expiration. If you have purchased the software and have a Trigger Code, navigate to **Utilities -> Modify License,** enter the code and click **Save.**



8. Upon successful login, FaciliWorks opens to the Dashboard:

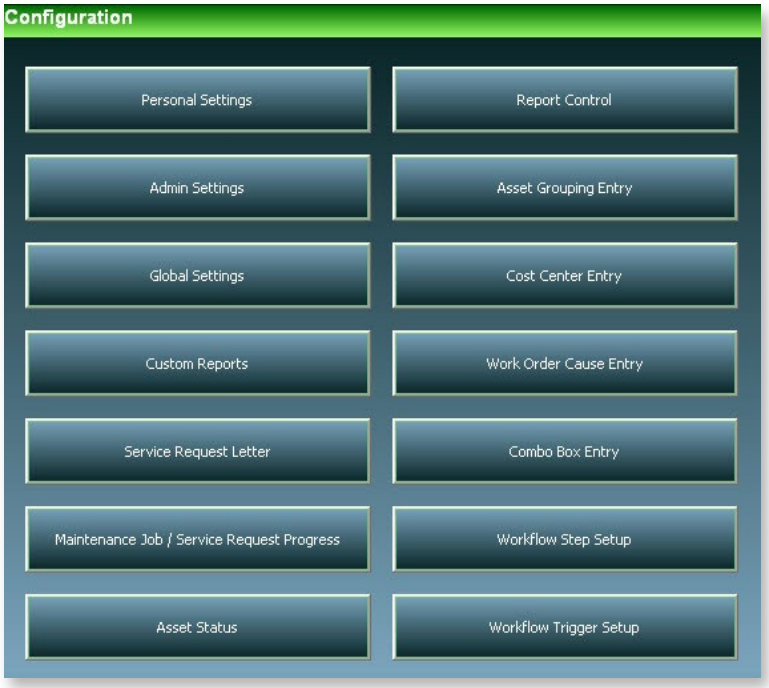
Chapter Three
Data Entry

To quickly get started with FaciliWorks and to efficiently use its major functions, it is important to populate the database so that information is available from the many drop-down or pop-up lists as you create PMs and Work Orders. We recommend that you first set up automatic numbering schemes for assets, parts and staff members if appropriate. Next, enter Procedures, Suppliers, Checklists, Contractors and Variables. Then, set up Inventory, Warehouse Locations, Personnel and Tools. Following these steps will make it easier to create Tasks which in turn will make it easy to add Assets. From there, you can begin to create PMs and Work Orders. Please see the FaciliWorks User Guide for detailed data entry instruction.


Enter Component Records
Set up Automatic Numbering for Asset IDs, Part IDs and Staff IDs.
Enter Procedures, Checklists and Variables.
Enter Suppliers, then Alternate Suppliers.
Enter Parts and Warehouses.
Enter Staff Records with Craft Codes, Training and Rates.
Enter Tools and associate Suppliers to them.
Enter Task Records
Enter Asset Records
Preventative Maintenance and Work Orders

Chapter Four
Program Configuration

To set your program preferences and enter user information, select **Configuration** from the Main Menu.



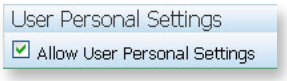
Personal Settings

Use **Personal Settings** to set preferences specific to a single user. Scroll to the bottom of the **Personal Settings** form to view the **Use Global Setting** checkbox:

By default, the **Use Global Setting** checkbox is checked which means that all preferences set in **Global Settings** override any choices made in **Personal Settings.**

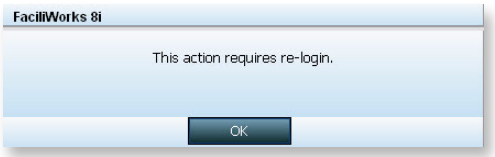
To allow personal settings to be used, you must do both of the following:

1. Uncheck the **Use Global Setting** checkbox AND
2. Go to the **Global Settings** form and check the **Allow User Personal Settings** checkbox.



Click the **Reset** button at the bottom of the **Personal Settings** form to revert back to default settings.

Click the **Update** button at the bottom of the **Personal Settings** form to save any changes. Re-login is required for **Personal Settings** changes to take effect:

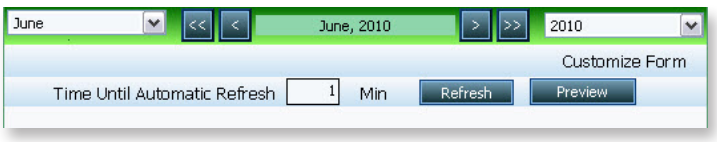


Click **OK** to be directed to the **Log In** form. Log in to FaciliWorks to see the results of your changes.

Calendar Refresh Interval

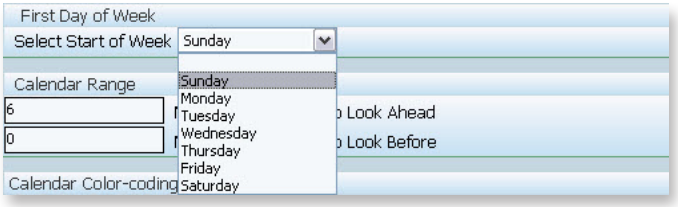
Enter an interval of time, in minutes, for the automatic refresh of the **Maintenance Jobs Calendar.** When you view the calendar, the program will automatically update the data according to this interval.

To view the calendar, click the calendar icon in the green header bar on the Dashboard. The number of minutes remaining until the next refresh will be displayed toward the top of the calendar. To refresh the calendar manually, click the **Refresh** button.



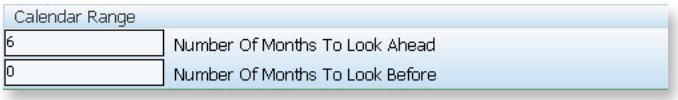
First Day of the Week

Use the **Select Start of Week** pull-down list to select the day of the week on which your work week begins. This day will be the first column in your **Maintenance Jobs Calendar** and all calendar pop-ups.



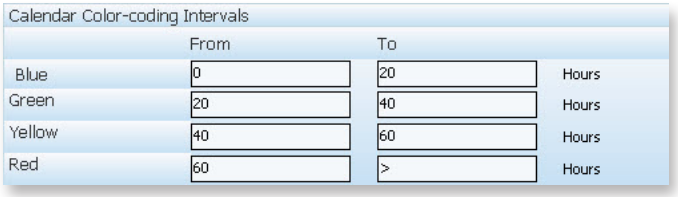
Calendar Range

In the **Calendar Range** section, define the range of time available for viewing in the FaciliWorks' calendar. The two fields in this section are **Number of Months to Look Ahead** and **Number of Months to Look Before.** To make only the current month available for viewing, enter 0 in both of these fields. These fields default to 6 and 0, respectively.



Calendar Color-coding

Color-code your calendar for the numbers of hour estimated for maintenance jobs.



If on a given day, there are 8 maintenance jobs scheduled whose estimated completion time totals 26 hours, that day will be marked as green on the **Maintenance Jobs Calendar,** based on the settings in the image above.

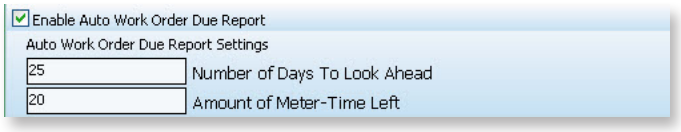
NOTE: You must use blue for your shortest range of time and red for your longest range of time.

Date Format and Currency Symbol

Select a date format and currency symbol from the respective drop-down lists:

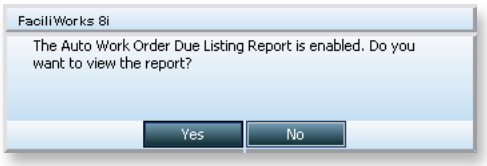
Reports - Auto Work Order Due Report

This report is a detailed list of all work orders currently due.

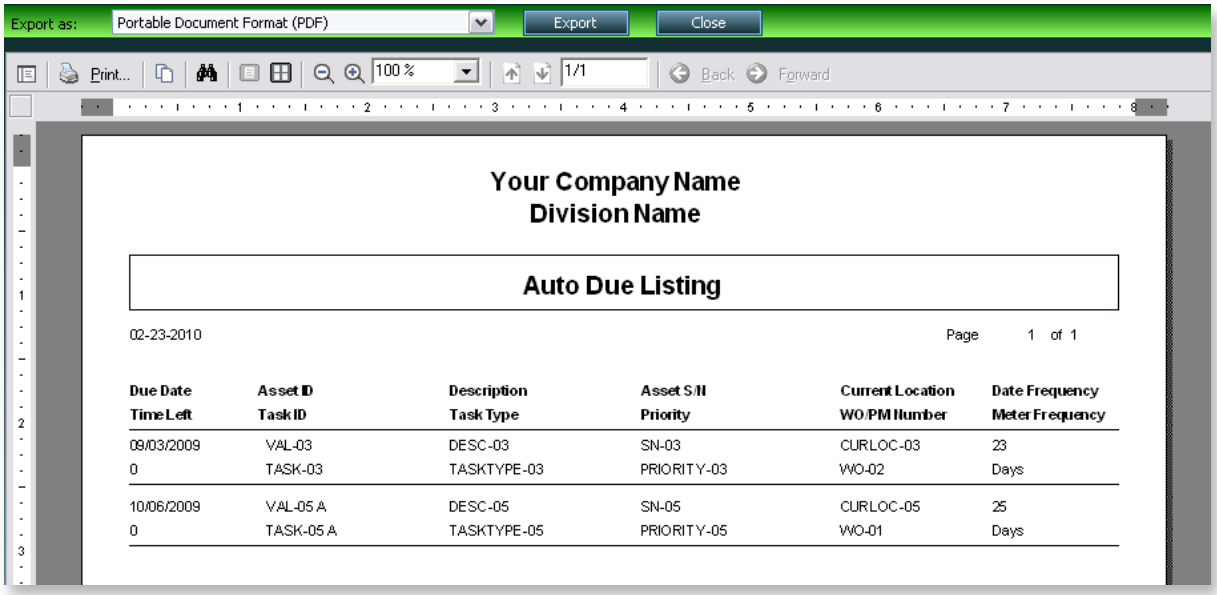

Enable Auto Work Order Due Report
Auto Work Order Due Report Settings
25
Number of Days To Look Ahead
20
Amount of Meter-Time Left

Check the **Enable Auto Work Order Due Report** checkbox; the **Number of Days to Look Ahead** and **Amount of Meter-Time Left** fields are automatically populated with 25 and 20, respectively. If you change these values, be sure to click the **Update** button at the bottom of the form to save your changes.

With this report enabled, each time you log in to FaciliWorks and attempt to navigate away from the Dashboard, you will receive the following prompt:

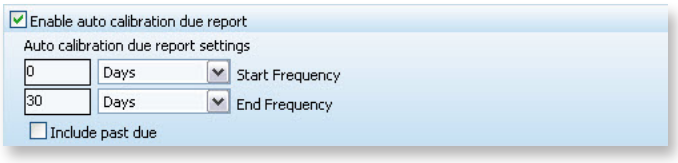


Click **No** to close the message and return to the program or click **Yes** to view the report:



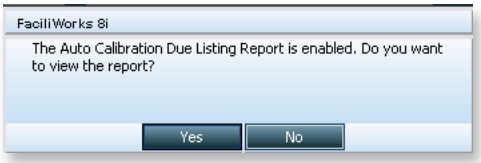
Reports - Auto Calibration Due Report (for 8i Calibration only)

This report is a detailed list of all calibrations currently due.



Check the **Enable Auto Calibration Due Report** checkbox. In the **Start Frequency** and **End Frequency** fields, enter a numeric value in the left-hand fields and select a unit of time from the drop-down lists in the right-hand fields. If you would like past due calibration orders to be included in the report, check the **Include Past Due** checkbox. After making any changes, be sure to click the **Update** button at the bottom of the form.

With this report enabled, each time you log in to FaciliWorks and attempt to navigate away from the Dashboard, you will receive the following prompt:

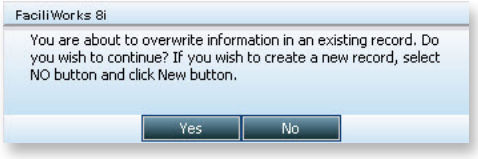


Click **No** to close the message and return to the program or click **Yes** to view the report

Field Overwrite Warning

Check the **Field Overwrite Warning** checkbox to receive a warning message when you attempt to overwrite any identification or key field contents.

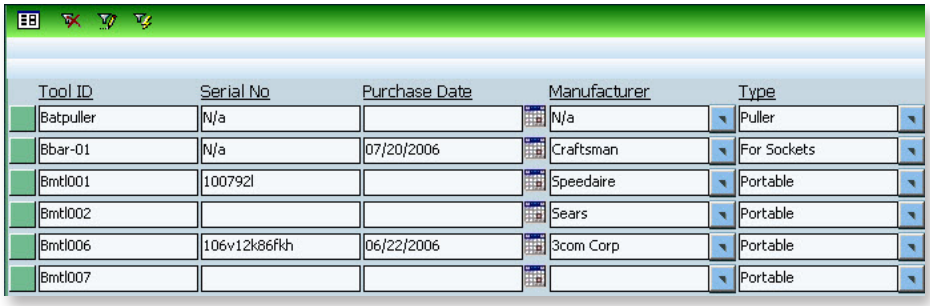
You will receive the following message when you attempt to save the changes:


FaciliWorks 8i
You are about to overwrite information in an existing record. Do you wish to continue? If you wish to create a new record, select NO button and click New button.
Yes
No

To overwrite the data, click **Yes;** otherwise, click **No.**

Datasheet Settings

Type a numeric value in the **Number of Records on Datasheet** field; the default quantity is 20. This record quantity refers to the number of rows shown at a time when in Datasheet View. A larger number will take longer to load with fewer pages to view.



Tool ID	Serial No	Purchase Date	Manufacturer	Type
Batpuller	N/a		N/a	Puller
Bbar-01	N/a	07/20/2006	Craftsman	For Sockets
Bmtl001	100792l		Speedaire	Portable
Bmtl002			Sears	Portable
Bmtl006	106v12k86fkh	06/22/2006	3com Corp	Portable
Bmtl007				Portable

Color Theme

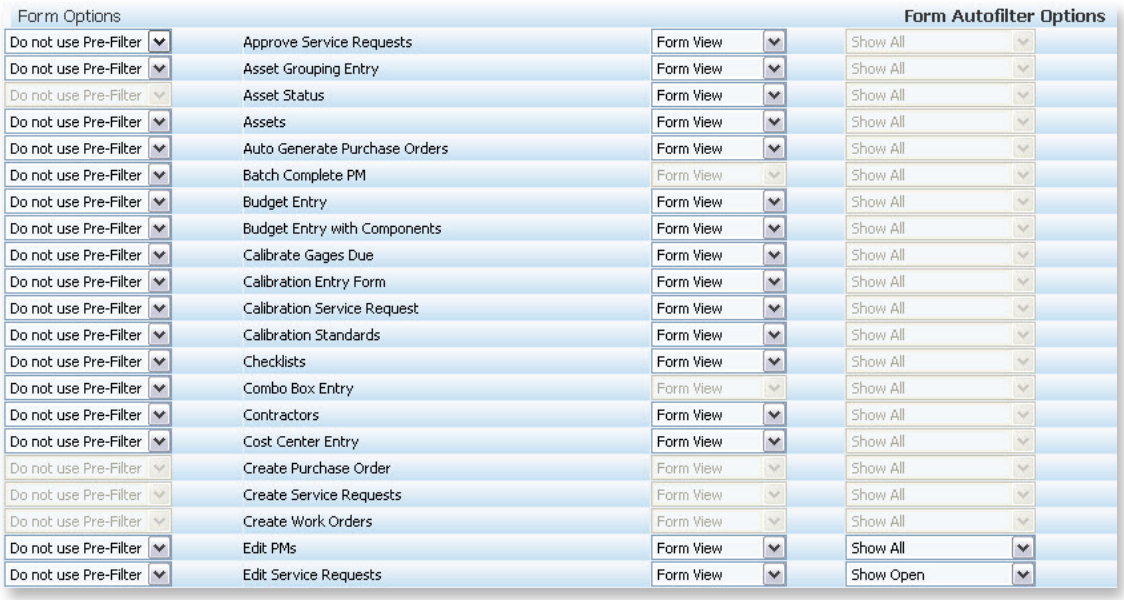
Use the **Select Color Theme** drop-down list to select your color theme preference. The FaciliWorks default is Vista.

Language

Use the **Select Language** drop-down list to select your language preference. Current language options include English, Spanish and French.

Form Options

Several forms within FaciliWorks have configurable filter and view options.



Form Options			Form Autofilter Options
Do not use Pre-Filter	Approve Service Requests	Form View	Show All
Do not use Pre-Filter	Asset Grouping Entry	Form View	Show All
Do not use Pre-Filter	Asset Status	Form View	Show All
Do not use Pre-Filter	Assets	Form View	Show All
Do not use Pre-Filter	Auto Generate Purchase Orders	Form View	Show All
Do not use Pre-Filter	Batch Complete PM	Form View	Show All
Do not use Pre-Filter	Budget Entry	Form View	Show All
Do not use Pre-Filter	Budget Entry with Components	Form View	Show All
Do not use Pre-Filter	Calibrate Gages Due	Form View	Show All
Do not use Pre-Filter	Calibration Entry Form	Form View	Show All
Do not use Pre-Filter	Calibration Service Request	Form View	Show All
Do not use Pre-Filter	Calibration Standards	Form View	Show All
Do not use Pre-Filter	Checklists	Form View	Show All
Do not use Pre-Filter	Combo Box Entry	Form View	Show All
Do not use Pre-Filter	Contractors	Form View	Show All
Do not use Pre-Filter	Cost Center Entry	Form View	Show All
Do not use Pre-Filter	Create Purchase Order	Form View	Show All
Do not use Pre-Filter	Create Service Requests	Form View	Show All
Do not use Pre-Filter	Create Work Orders	Form View	Show All
Do not use Pre-Filter	Edit PMs	Form View	Show All
Do not use Pre-Filter	Edit Service Requests	Form View	Show Open

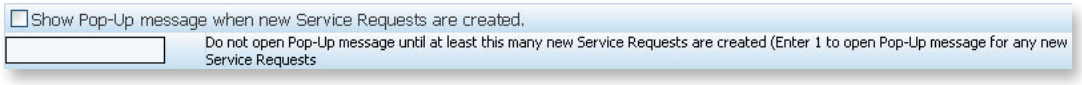
In the first column of fields in the image above, select whether or not to open the form with a pre-filter. The default is to open the form showing the data records. If this option is enabled and you do not want to use the pre-filter, click the **Find All** button at the bottom of the pre-filter window.

The second column lists FaciliWorks form names.

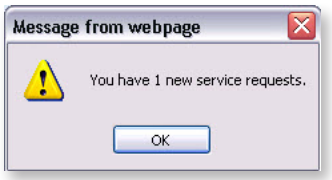
In the third column, select the view option to open the form; either form view (default) or datasheet view.

In the fourth column, for forms such as Edit PMs, select to see **All, Open** or **Closed/Completed** orders. It is recommended that Open is selected for Edit PMs and Work Order Manager; when you navigate to these areas, only the incomplete PMs and WOs are initially visible, making it easier to locate orders that must be completed. If filters are enabled here, the filters can be removed when viewing the individual forms by clicking the form's **Show All Records** icon located on the filter icon bar at the top left of the screen.

Service Request Alert

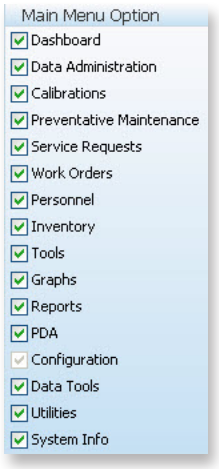

Show Pop-Up message when new Service Requests are created.
Do not open Pop-Up message until at least this many new Service Requests are created (Enter 1 to open Pop-Up message for any new Service Requests

Check the checkbox shown above to receive a pop-up alert when service requests are created. Type a numeric value in the next field to represent the number of service requests that must be created before you receive the alert. The message will look similar to the following:



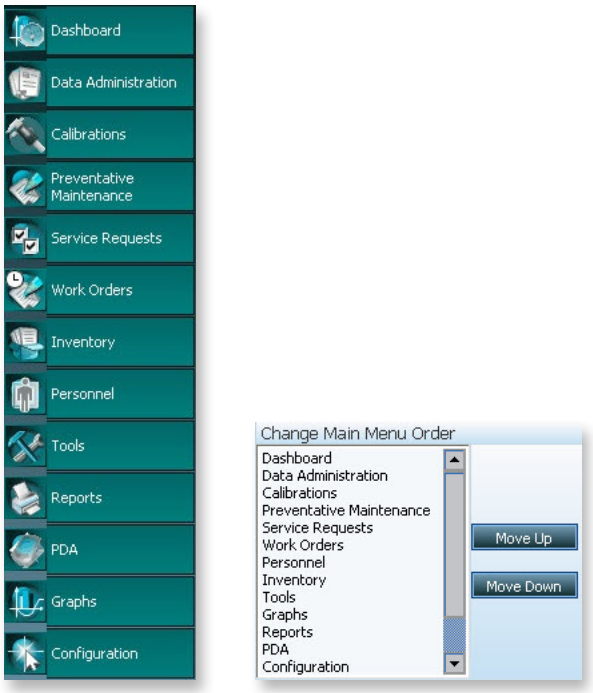
Main Menu Options

Check the checkbox to make the Main Menu item visible; uncheck the checkbox to hide it. The **Configuration** checkbox cannot be unchecked; this prevents the user from being locked out of the software.



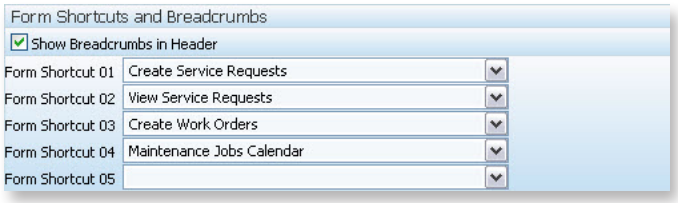
Change Main Menu Order

The items in the Main Menu are sorted as follows by default (**Calibrations** is only present in FaciliWorks 8i Calibration):

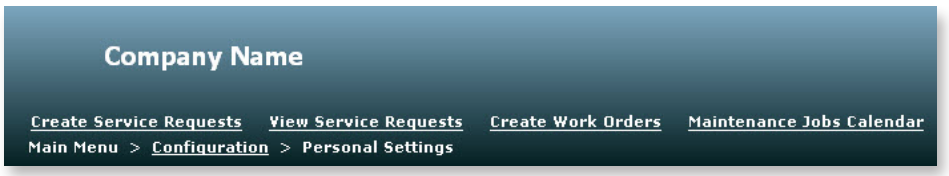


Change the order of these items by clicking an item to highlight it, then clicking the **Move Up** or **Move Down** buttons to move the item up or down in the list.

Form Shortcuts and Breadcrumbs



Check the **Show Breadcrumbs in Header** checkbox to view your current location within the software in the header of the FaciliWorks window (the bottom row of text in the image below). The example below shows that from the Main Menu, the **Configuration** module was selected and then you navigated to **Personal Settings.**



To create shortcut links to the areas of the software you use most often, use the drop-down lists in the **Form Shortcut** fields **(01-05).** The text versions of these shortcuts appear in the header of the FaciliWorks window above the breadcrumbs (pictured above) when you're viewing any area of FaciliWorks except the Dashboard.

When on the Dashboard, these shortcuts appear in the icon toolbar located on the green header strip (pictured below), above the dashboard summary window. The **Maintenance Jobs Calendar** icon is included in your shortcuts by default. Clicking the blue arrow button next to the **Maintenance Jobs Calendar** icon shows or hides the shortcut icons.

Breadcrumbs and shortcuts can be deactivated by un-checking the **Show Breadcrumbs in Header** checkbox and leaving the five **Form Shortcut** fields blank.

Global Settings

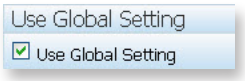
Whereas personal settings are applicable only to a single user, **Global Settings** define the settings for all users. The options in this section are similar to those in the personal setting section.

By default, the preferences defined in **Global Settings** override any choices made in **Personal Settings.** To allow personal settings to be used, scroll to the bottom of the **Global Settings** form and check the **Allow User Personal Settings** checkbox. Please see the **Personal Settings** section for more details.

To make sure that only **Global Settings** are used, you must do both of the following:

1. Uncheck the **Allow User Personal Settings** checkbox (in Global Settings):

2. Check the **Use Global Setting** checkbox (in Personal Settings):



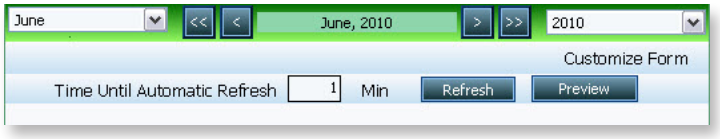
Click the **Update** button at the bottom of the form to save any changes. Re-login is required for **Global Settings** changes to take effect:

Click **OK** to be directed to the **Log In** form. Log in to FaciliWorks to see the results of your changes.

Calendar Refresh Interval

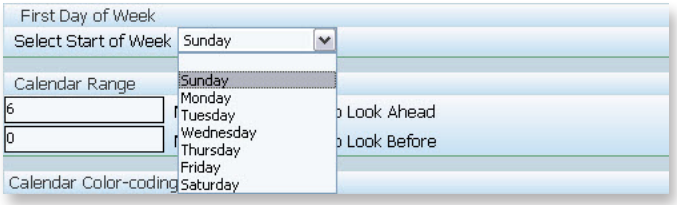
Enter an interval of time, in minutes, for the automatic refresh of the **Maintenance Jobs Calendar.** When you view the calendar, the program will automatically update the data according to this interval.

To view the calendar, click the calendar icon in the green header bar on the Dashboard. The number of minutes remaining until the next refresh will be displayed toward the top of the calendar. To refresh the calendar manually, click the **Refresh** button.



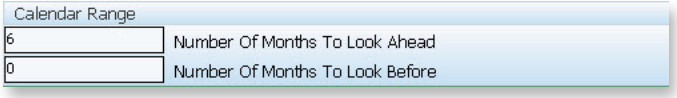
First Day of the Week

Use the **Select Start of Week** pull-down list to select the day of the week on which your work week begins. This day will be the first column in your **Maintenance Jobs Calendar** and all calendar pop-ups.



Calendar Range

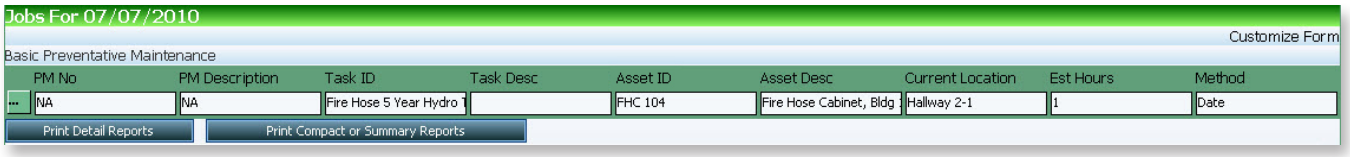
In the **Calendar Range** section, define the range of time available for viewing in the FaciliWorks' calendar. The two fields in this section are **Number of Months to Look Ahead** and **Number of Months to Look Before.** To make only the current month available for viewing, enter 0 in both of these fields. These fields default to 6 and 0, respectively.



Calendar Include

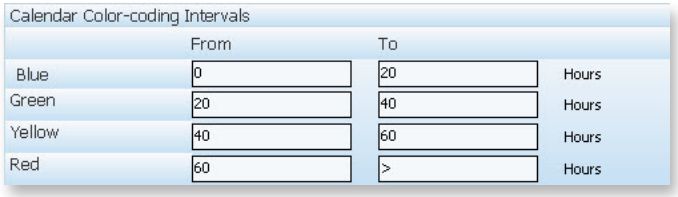
Click the radio buttons to select the items to be included in your calendar. The default values in the **Display Value** fields are **Date** and **Meter.**

View the **Maintenance Jobs Calendar** and click on a day that shows a job is due. A summary list of the jobs due that day will appear in a separate window. The field on the right of that window is the **Method** field. The values entered in the **Display Value** fields pictured above populate the **Method** field shown in the image below. **Date** signifies that the work is due on a date-based schedule; **Meter** signifies a meter-based schedule.



Calendar Color-coding

Color-code your calendar for the numbers of hour estimated for maintenance jobs.

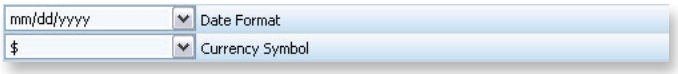


If on a given day, there are 8 maintenance jobs scheduled whose estimated completion time totals 26 hours, that day will be marked as green on the **Maintenance Jobs Calendar,** based on the settings in the image above.

NOTE: You must use blue for your shortest range of time and red for your longest range of time.

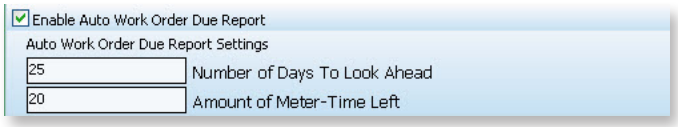
Date Format and Currency Symbol

Select a date format and currency symbol from the respective drop-down lists:



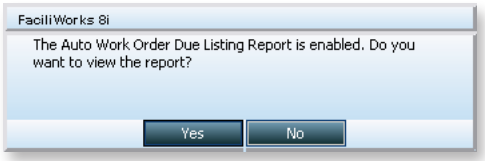
Reports - Auto Work Order Due Report

This report is a detailed list of all work orders currently due.

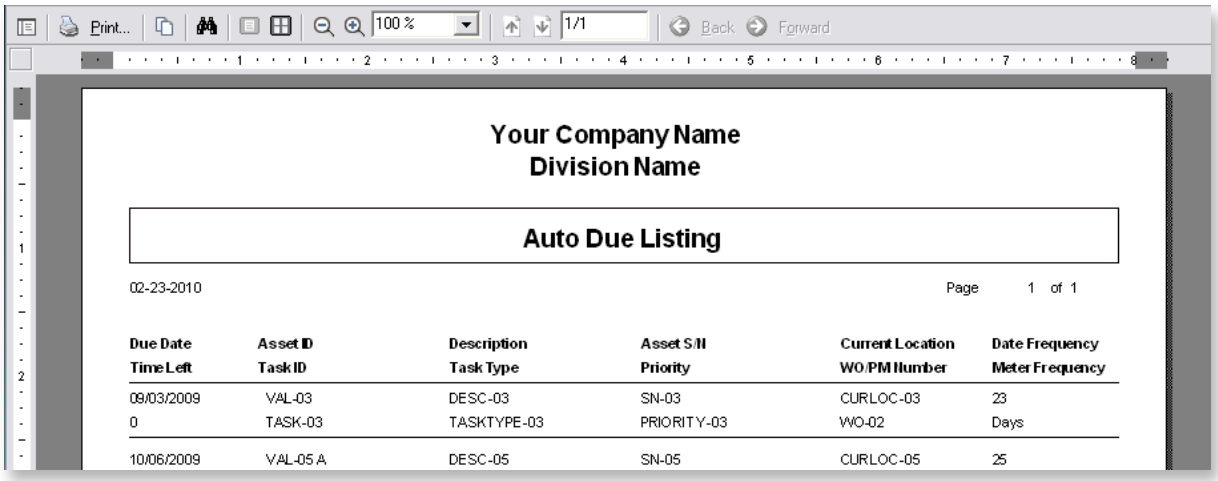

Enable Auto Work Order Due Report
Auto Work Order Due Report Settings
25
Number of Days To Look Ahead
20
Amount of Meter-Time Left

Check the **Enable Auto Work Order Due Report** checkbox; the **Number of Days to Look Ahead** and **Amount of Meter-Time Left** fields are automatically populated with 25 and 20, respectively. If you change these values, be sure to click the **Update** button at the bottom of the form to save your changes.

With this report enabled, each time you log in to FaciliWorks and attempt to navigate away from the Dashboard, you will receive the following prompt:

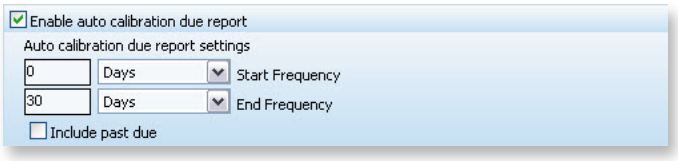


Click **No** to close the message and return to the program or click **Yes** to view the report:



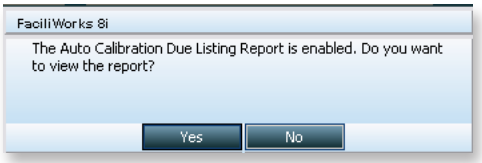
Reports - Auto Calibration Due Report (for 8i Calibration only)

This report is a detailed list of all calibrations currently due.



Check the **Enable Auto Calibration Due Report** checkbox. In the **Start Frequency** and **End Frequency** fields, enter a numeric value in the left-hand fields and select a unit of time from the drop-down lists in the right-hand fields. If you would like past due calibration orders to be included in the report, check the **Include Past Due** checkbox. After making any changes, be sure to click the **Update** button at the bottom of the form.

With this report enabled, each time you log in to FaciliWorks and attempt to navigate away from the Dashboard, you will receive the following prompt:

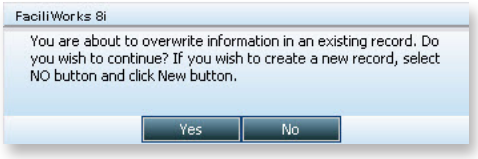


Click **No** to close the message and return to the program or click **Yes** to view the report

Field Overwrite Warning

Check the **Field Overwrite Warning** checkbox to receive a warning message when you attempt to overwrite any identification or key field contents.

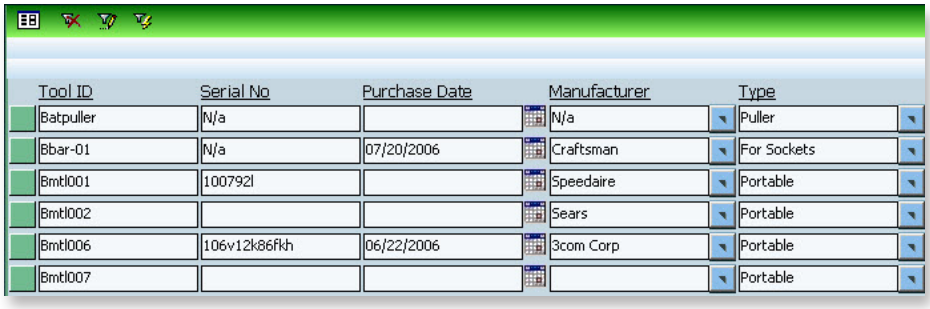
You will receive the following message when you attempt to save the changes:


FaciliWorks 8i
You are about to overwrite information in an existing record. Do you wish to continue? If you wish to create a new record, select NO button and click New button.
Yes
No

To overwrite the data, click **Yes;** otherwise, click **No.**

Datasheet Settings

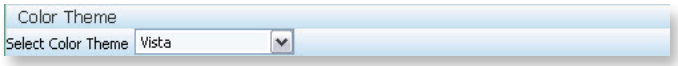
Type a numeric value in the **Number of Records on Datasheet** field; the default quantity is 20. This record quantity refers to the number of rows shown at a time when in Datasheet View. A larger number will take longer to load with fewer pages to view.



Tool ID	Serial No	Purchase Date	Manufacturer	Type
Batpuller	N/a		N/a	Puller
Bbar-01	N/a	07/20/2006	Craftsman	For Sockets
Bmtl001	100792l		Speedaire	Portable
Bmtl002			Sears	Portable
Bmtl006	106v12k86fkh	06/22/2006	3com Corp	Portable
Bmtl007				Portable

Color Theme

Use the **Select Color Theme** drop-down list to select your color theme preference. The FaciliWorks default is Vista.

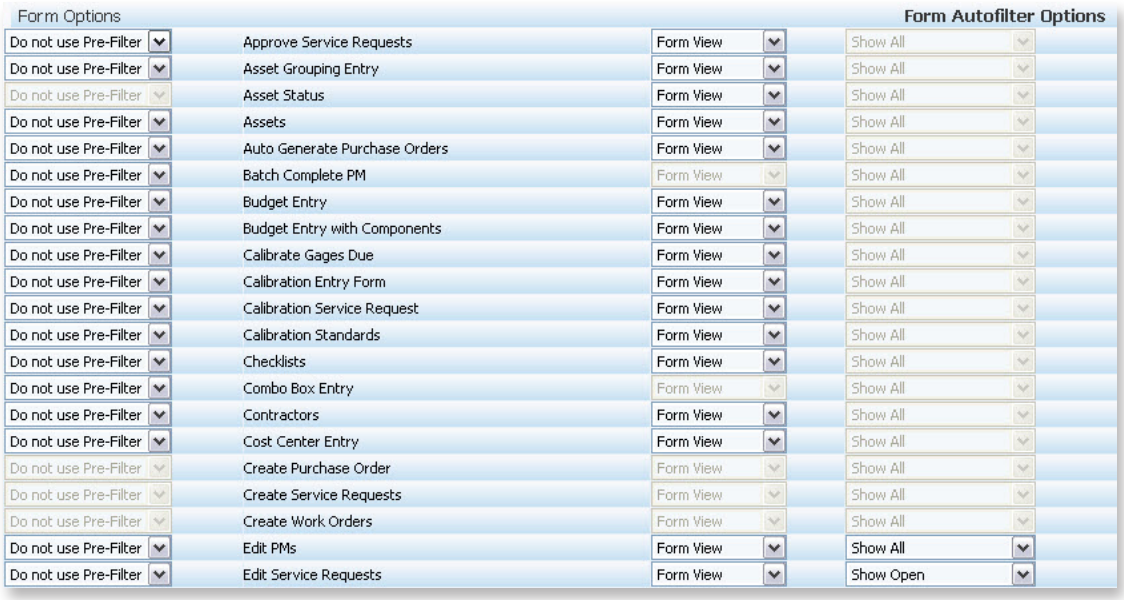


Language

Use the **Select Language** drop-down list to select your language preference. Current language options include English, Spanish and French.

Form Options

Several forms within FaciliWorks have configurable filter and view options.



Form Options			Form Autofilter Options
Do not use Pre-Filter	Approve Service Requests	Form View	Show All
Do not use Pre-Filter	Asset Grouping Entry	Form View	Show All
Do not use Pre-Filter	Asset Status	Form View	Show All
Do not use Pre-Filter	Assets	Form View	Show All
Do not use Pre-Filter	Auto Generate Purchase Orders	Form View	Show All
Do not use Pre-Filter	Batch Complete PM	Form View	Show All
Do not use Pre-Filter	Budget Entry	Form View	Show All
Do not use Pre-Filter	Budget Entry with Components	Form View	Show All
Do not use Pre-Filter	Calibrate Gages Due	Form View	Show All
Do not use Pre-Filter	Calibration Entry Form	Form View	Show All
Do not use Pre-Filter	Calibration Service Request	Form View	Show All
Do not use Pre-Filter	Calibration Standards	Form View	Show All
Do not use Pre-Filter	Checklists	Form View	Show All
Do not use Pre-Filter	Combo Box Entry	Form View	Show All
Do not use Pre-Filter	Contractors	Form View	Show All
Do not use Pre-Filter	Cost Center Entry	Form View	Show All
Do not use Pre-Filter	Create Purchase Order	Form View	Show All
Do not use Pre-Filter	Create Service Requests	Form View	Show All
Do not use Pre-Filter	Create Work Orders	Form View	Show All
Do not use Pre-Filter	Edit PMs	Form View	Show All
Do not use Pre-Filter	Edit Service Requests	Form View	Show Open

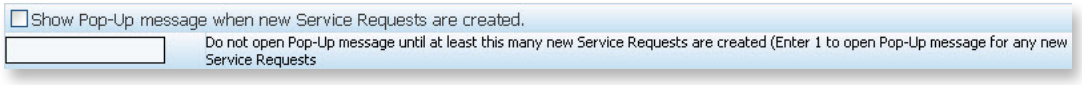
In the first column of fields in the image above, select whether or not to open the form with a pre-filter. The default is to open the form showing the data records. If this option is enabled and you do not want to use the pre-filter, click the **Find All** button at the bottom of the pre-filter window.

The second column lists FaciliWorks form names.

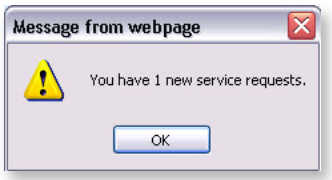
In the third column, select the view option to open the form; either form view (default) or datasheet view.

In the fourth column, for forms such as Edit PMs, select to see **All, Open** or **Closed/Completed** orders. It is recommended that Open is selected for Edit PMs and Work Order Manager; when you navigate to these areas, only the incomplete PMs and WOs are initially visible, making it easier to locate orders that must be completed. If filters are enabled here, the filters can be removed when viewing the individual forms by clicking the form's **Show All Records** icon located on the filter icon bar at the top left of the screen.

Service Request Alert

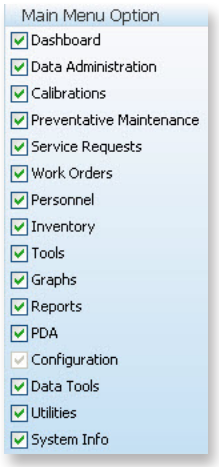

Show Pop-Up message when new Service Requests are created.
Do not open Pop-Up message until at least this many new Service Requests are created (Enter 1 to open Pop-Up message for any new Service Requests

Check the checkbox shown above to receive a pop-up alert when service requests are created. Type a numeric value in the next field to represent the number of service requests that must be created before you receive the alert. The message will look similar to the following:



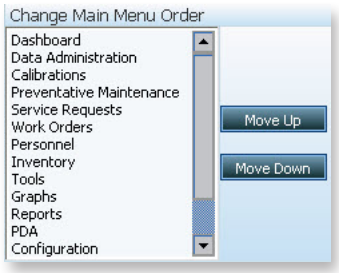
Main Menu Options

Check the checkbox to make the Main Menu item visible; uncheck the checkbox to hide it. The **Configuration** checkbox cannot be unchecked; this prevents the user from being locked out of the software.



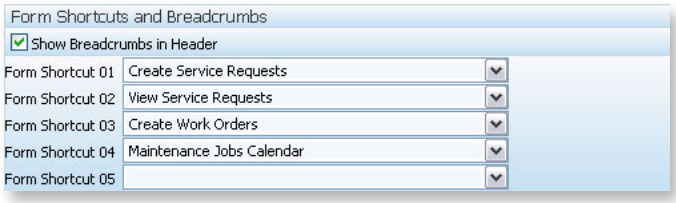
Change Main Menu Order

The items in the Main Menu are sorted as follows by default (**Calibrations** is only present in FaciliWorks 8i Calibration):

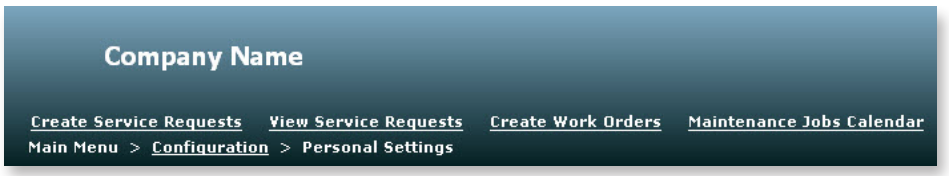


Change the order of these items by clicking an item to highlight it, then clicking the **Move Up** or **Move Down** buttons to move the item up or down in the list.

Form Shortcuts and Breadcrumbs



Check the **Show Breadcrumbs in Header** checkbox to view your current location within the software in the header of the FaciliWorks window (the bottom row of text in the image below). The example below shows that from the Main Menu, the **Configuration** module was selected and then you navigated to **Personal Settings.**



To create shortcut links to the areas of the software you use most often, use the drop-down lists in the **Form Shortcut** fields **(01-05).** The text versions of these shortcuts appear in the header of the FaciliWorks window above the breadcrumbs (pictured above) when you're viewing any area of FaciliWorks except the Dashboard.

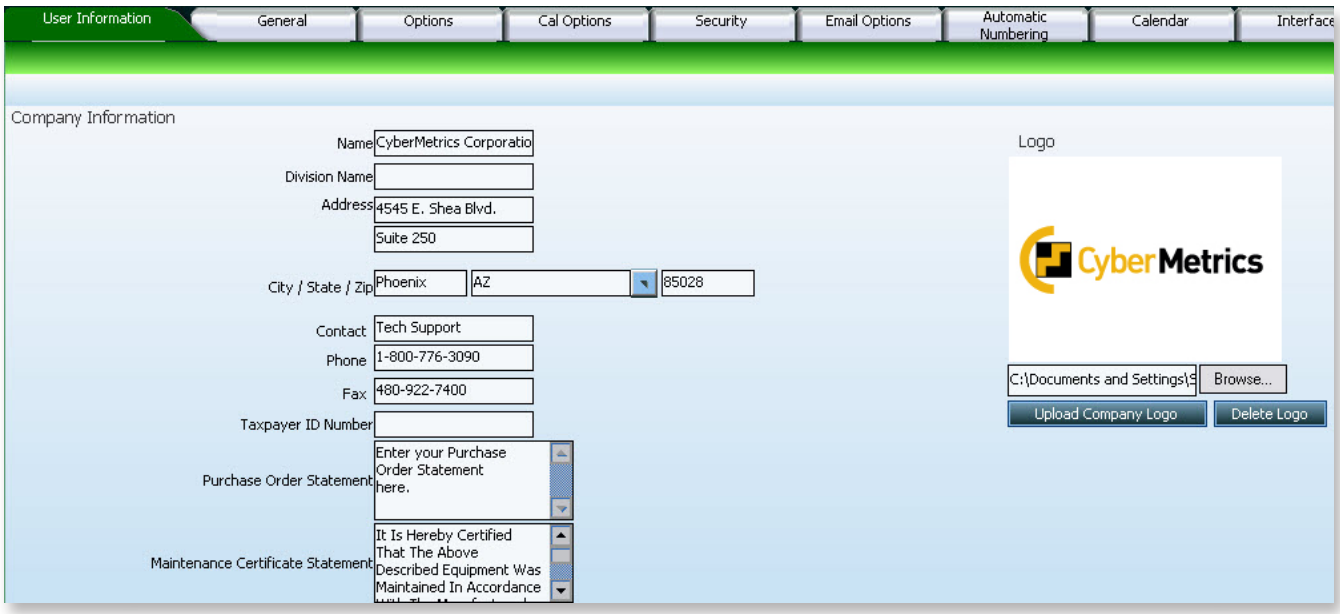
When on the Dashboard, these shortcuts appear in the icon toolbar located on the green header strip (pictured below), above the dashboard summary window. The **Maintenance Jobs Calendar** icon is included in your shortcuts by default. Clicking the blue arrow button next to the **Maintenance Jobs Calendar** icon shows or hides the shortcut icons.

Breadcrumbs and shortcuts can be deactivated by un-checking the **Show Breadcrumbs in Header** checkbox and leaving the five **Form Shortcut** fields blank.

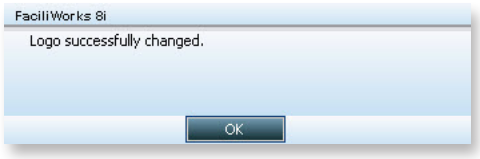
Admin Settings

User Information Tab

In the **Admin Settings -> User Information** tab, enter your company information in the appropriate fields and upload your logo. The address entered here will appear as the ship-to address on all purchase orders created within FaciliWorks, along with the **Taxpayer ID Number** and **Purchase Order Statement.** The two fields for company name (**Name** and **Division Name**) and the optional logo will appear at the top of all of your reports.



In the logo pane, click the **Browse** button to locate and select your digital company logo. Your logo will be displayed on screen and you will receive the following message:



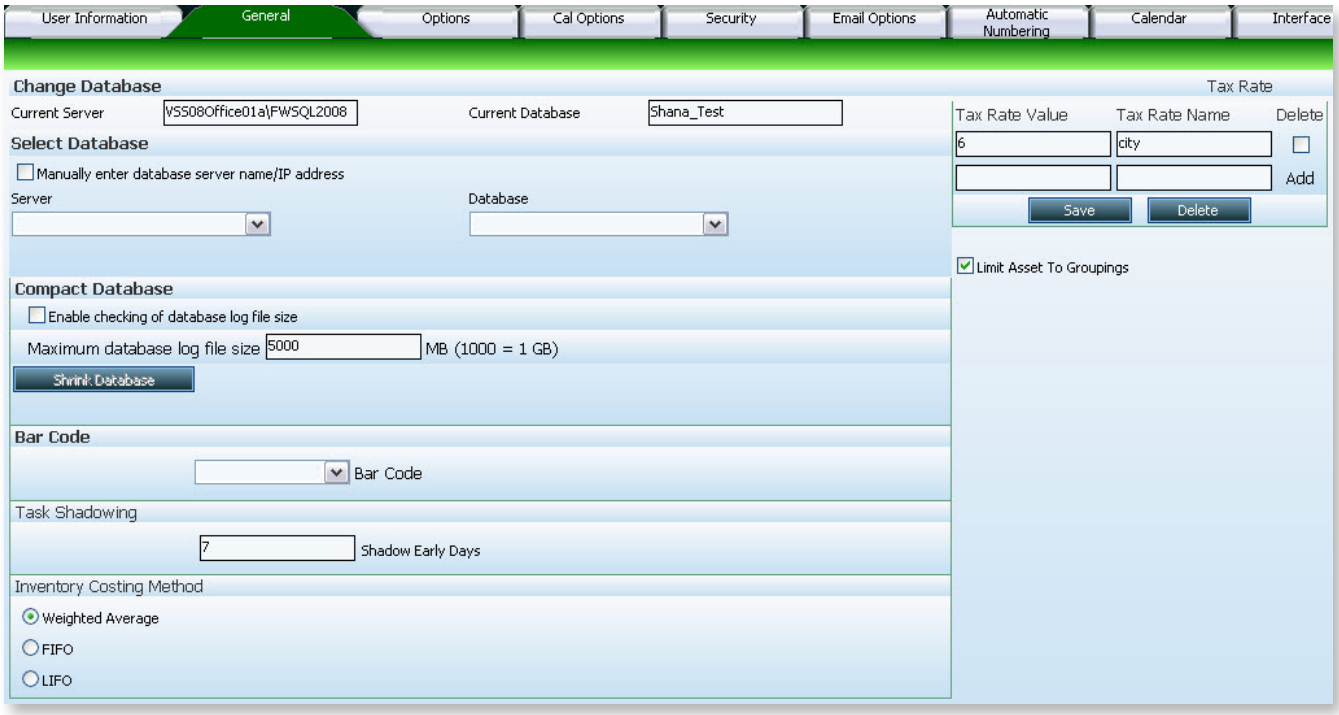
Click **OK.**

Ideally, the logo graphic you insert or paste should be no larger than the space provided (about 1" square), and use no more than 8-bit color (256 colors). Large, high-resolution graphics may use system resources unnecessarily. This may slow down report printing or prevent your logo from being printed at all. If your logo is visible in on this form after uploading, but does not appear on your reports, it requires too much memory and should be replaced with a smaller graphic using fewer colors. For best results, we recommend that you upload a .BMP file, regardless of how the logo was originally created.

To delete your logo, click the **Delete Logo** button. Click **Save** after any changes.

Maintenance Certificate Statement: This statement includes Certificates of Maintenance which might be required to satisfy asset warranties. This statement is printed on all completed work order reports.

General Tab



Change Database

Current Server: The name of the database server FaciliWorks is currently using.

Current Database: The name of the database FaciliWorks is currently accessing.

Select Database

Server: If you need to change to a different database server, select the name of the server from the drop-down list. Once a server is selected, a dialog box will appear requiring a user ID and password to access the database server.

Database: Once the server has been selected, choose a database from the drop-down list. The list will consist of databases that are available on the selected server. The default listing of database names consist with a prefix of "PM."

If you do not find the name of the database you are looking for, (i.e., default name was changed), then click the **Manually enter database server name/IP address** checkbox to enter these values manually.

Barcode

Use the **Barcode** drop-down list to select the type of barcode format you want to use. You can select Code 39 (contains capital letters and numbers) or Code 128 (contains letters, numbers, control characters and some symbols).

Task Shadowing

Shadow Early Days: Indicate the maximum number of days between the completion of a shadowing task and the completion of a shadowed task.

When using the task shadowing feature, a shadowed task PM will not be created if the shadowed task and the shadowing task are due within the specified number of days identified here. For instance, entering 7 will mean that if the dates for the shadowing task and shadowed task fall within 7 days of each other, the shadowing task PM is the only PM that will be scheduled. When the shadowing task is completed, the shadowed task is also closed so that the next due date remains on schedule.

Tax Rate

Enter the tax percentages in the **Tax Rate Value** fields and types (such as State, County or City) in the **Tax Rate Name** fields. When you create purchase orders, you can select the tax rate from this list.

Delete Checkbox and Delete Button: To delete a row from the **Tax Rate** pane, check the **Delete** checkbox associated with that row and click the **Delete** button.

Limit Asset to Groupings: Check this checkbox to enable **Asset Grouping. Asset Grouping** must be set up prior to checking this checkbox. For more information, see **Asset Grouping Entry.**

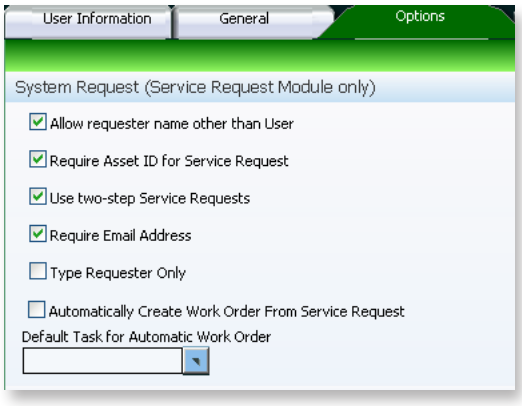
Inventory Costing Method

In this pane, indicate the **Inventory Costing Method** used by your accounting department: **Weighted Average**, **LIFO** or **FIFO** by clicking the appropriate radio button.

Options Tab

System Request Pane (Service Request Module Only)

If you have the optional **Service Request Module** installed, select from the following options:


User Information
General
Options
System Request (Service Request Module only)
Allow requester name other than User
Require Asset ID for Service Request
Use two-step Service Requests
Require Email Address
Type Requester Only
Automatically Create Work Order From Service Request
Default Task for Automatic Work Order

Allow requester name other than User allows users to select service requester names other than their own from the pop-up menu.

Require Asset ID for Service Request allows you to select whether you require requesters to reference an Asset ID with every service request.

Use Two-Step Service Requests requires approval of service requests before they become work orders.

Require Email Address requires that the requester supply his/her email address with each service request. This field auto-fills from the email field on the requester's staff record if the requester has a staff record in the database.

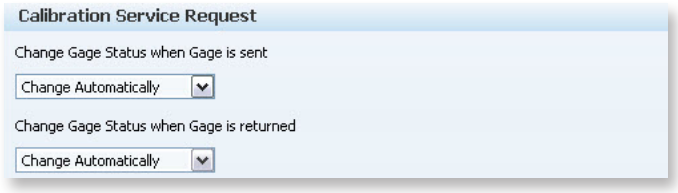
Type Requester Only requires the user to manually type a name in the **Requested By** field; the pop-up list is not active.

Automatically Create Work Order from Service Request will create a work order from each service request that is submitted. This action will bypass both the approval and edit procedures. You must select a default task before enabling this feature.

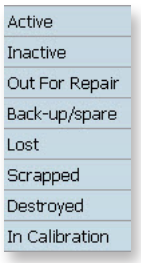
Default Task for Automatic Work Order: Before enabling the automatic creation of a service request feature, this field must contain your selection from the pop-up list for the single default task that to be used on all automatically created work orders.

Calibration Service Request (for 8i Calibration only)

Use the drop-down boxes in the **Change Gage Status When Gage Is Sent** and **Change Gage Status When Gage Is Returned** to select whether you want a gage's status to change automatically, if you want FaciliWorks to ask you each time or if you do not want the status of gages to change at all.

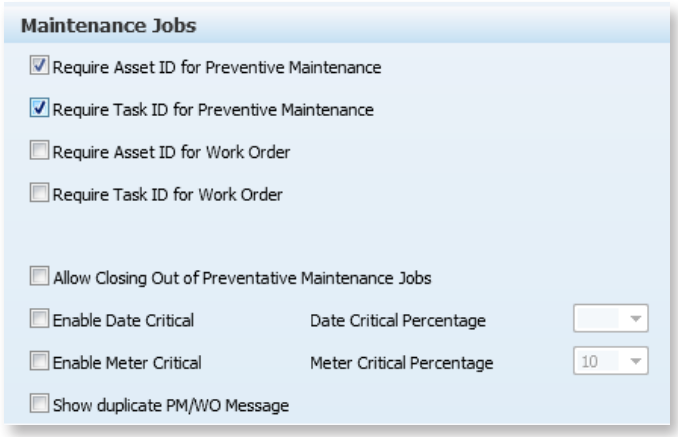

Calibration Service Request
Change Gage Status when Gage is sent
Change Automatically
Change Gage Status when Gage is returned
Change Automatically

This is a gage **Status** pop-up list found on gage records within the **Assets -> Information** tab:



Maintenance Jobs

Check the boxes to specify the required identification fields on PMs and WOs.


Maintenance Jobs
Require Asset ID for Preventive Maintenance
Require Task ID for Preventive Maintenance
Require Asset ID for Work Order
Require Task ID for Work Order
Allow Closing Out of Preventative Maintenance Jobs
Enable Date Critical
Date Critical Percentage
Enable Meter Critical
Meter Critical Percentage
10
Show duplicate PM/WO Message

Require Asset ID for Preventative Maintenance, Require Task ID for Preventative Maintenance, Require Asset ID for Work Order and **Require Task ID for Work Order:** Check the checkboxes for the conditions that need to be met regarding the asset and task ID fields for preventative maintenance jobs and work orders. It is recommended that all boxes be checked for better tracking.

Allow Closing out of Preventative Maintenance Jobs permits you to close a PM without actually completing it. This will force FaciliWorks to generate the next scheduled PM. All closed, incomplete PMs will be listed at the bottom of the **Manual Create PMs** form.

Enable Date Critical: Enables the software to display scheduled jobs in **Manual Create PMs** based on the critical % of the date-based schedule, overriding the lead time specified in **Auto/Manual Create PMs**.

Date Critical Percentage: The scheduled date-based job will display when it reaches this %.

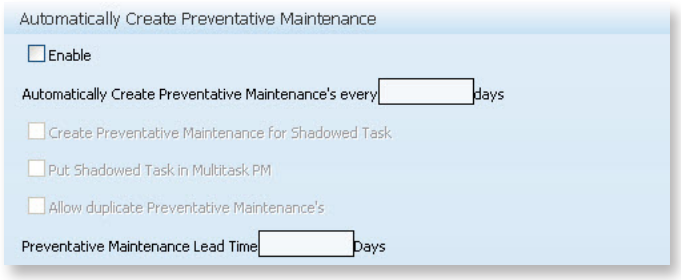
Enable Meter Critical: Enables the software to display scheduled jobs in **Manual Create PMs** based on the critical % of the meter-based schedule, overriding the lead time specified in **Auto/Manual Create PMs**.

Meter Critical Percentage: The scheduled meter-based job will display when it reaches this %.

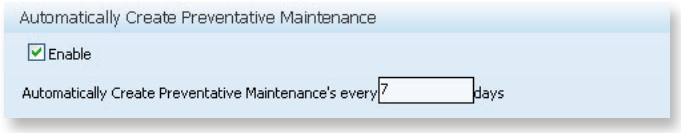
Check the **Show Duplicate PM/WO Message** checkbox to receive an alert when a duplicate PM or WO has been created. This alert will ask if you want to delete the duplicate(s). Click **Yes** to delete or click **No** to manually review/edit the duplicate(s).

Automatically Create Preventative Maintenance

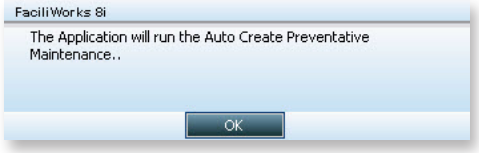
The options in this section give you control over whether or not preventative maintenance records are created automatically and if so, how frequently.



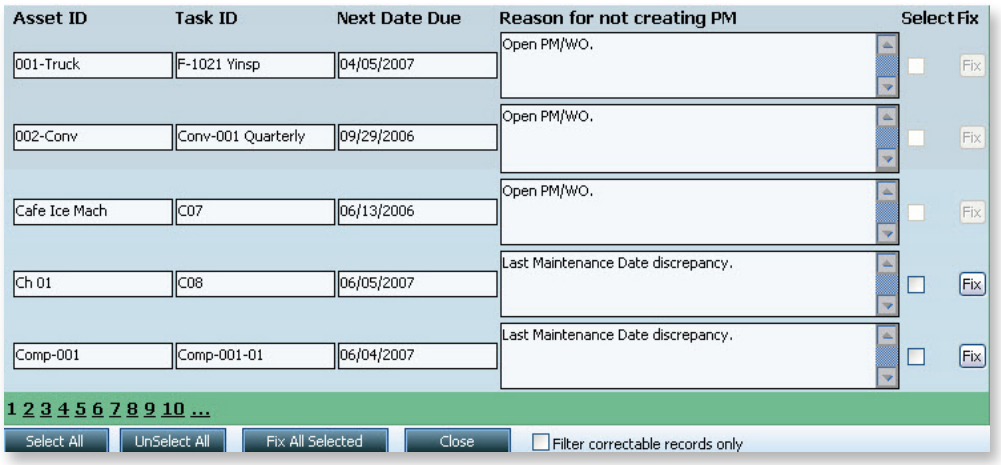
Checking the **Enable** checkbox allows PMs to be created automatically. Enabling this function requires that you enter a frequency (in days) in the **Automatically Create Preventative Maintenances Every _____ Days** field.



When this function is enabled, as in the image above, every seven days, upon logging in to FaciliWorks, the following dialog will appear:



Click **OK.** A list of any PMs that could not be automatically created will appear in a separate window:



An asset that already has an open PM or work order will appear in this list only if the **Allow Duplicate Preventative Maintenances** checkbox is unchecked. If that checkbox is checked, these PMs would have been automatically created because duplicates are allowed.

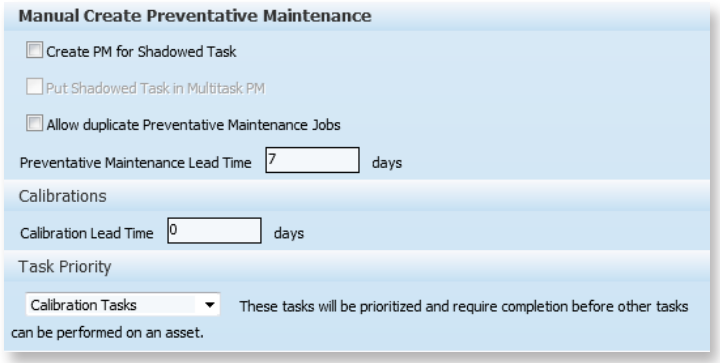
If an asset's schedule contains a date discrepancy, this can be corrected. Click the **Fix** button beside the individual records or check multiple checkboxes associated with the assets and click the **Fix All Selected** button at the bottom of the form. When the **Fix** button becomes inactive, you can navigate to **Manual Create PMs** and manually create the adjusted PM.

Create Preventative Maintenance for Shadowed Task will create a PM for any shadowed task when the parent (or shadowing) task is due. Checking this checkbox activates the **Put Shadowed Task in Multitask PM** checkbox; checking this checkbox instructs FaciliWorks to create a multitask PM with the shadowed/shadowing tasks.

Enter a numeric value in the **Preventative Maintenance Lead Time _____ Days** field. This field specifies the number of days into the future that scheduled jobs will be displayed on the **Manual Create PMs** form. For example, show jobs scheduled for the next 7 days.

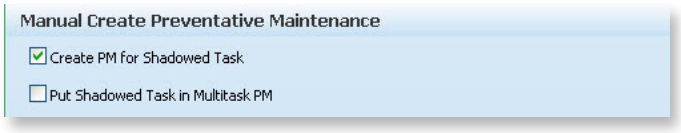
Manual Create Preventative Maintenance

In this section, set the conditions for the manual creation of PMs.



Create PM for Shadowed Task: When this box is checked, all shadowed tasks will be created as PMs.

Put Shadowed Task in Multitask PM: Instructs FaciliWorks to create a multitask PM with the shadowed/shadowing tasks. This option is activated only after checking the **Create PM for Shadowed Task** checkbox which will create a PM for any shadowed task when the parent (or shadowing) task is due.



Allow Duplicate Preventative Maintenance Jobs: Checking this box will allow a PM to be created for a task even if there is currently an open PM order for the same task.

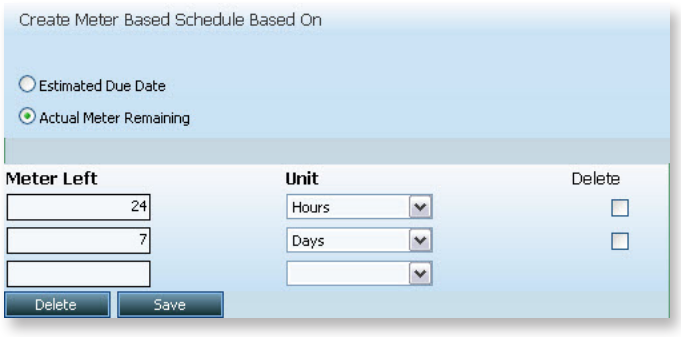
Enter a numeric value in the **Preventative Maintenance Lead Time ____ Days** field. This field specifies the number of days into the future that the jobs will be displayed on the **Manual Create PMs** form. The default is set to show jobs scheduled for the next 7 days.

Calibration Lead Time ____ Days field (8i Calibration only): Enter a numeric value to specify the number of days into the future that scheduled calibrations will be displayed on the **Calibrate Gages Due** form.

Task Priority (8i Calibration Only): From the drop-down list, select Calibration Tasks, Maintenance Tasks or No Priority Tasks when both maintenance and calibration is due on the same asset at the same time.

Create Meter-Based Schedule

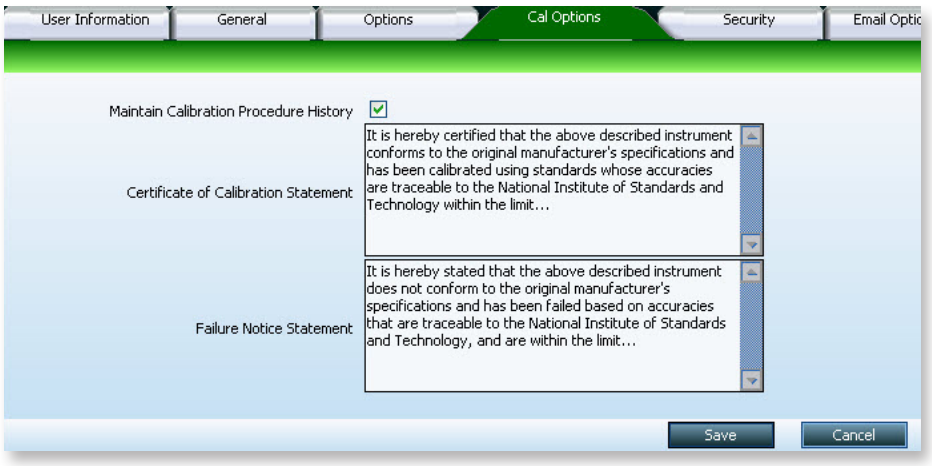
You can create a meter-based schedule here based on either the estimated due date or the actual meter remaining.



If **Actual Meter Remaining** is selected, then below it, the **Meter Left** and **Unit** fields will become editable, allowing you to enter values to determine the remaining amount that will trigger the creation of a PM order. Enter a numeric value in the **Meter Left** field and use the drop-down list in the **Unit** field to select a unit of measure. Then, click the **Save** button below the **Meter Left** field to save the data. A new, blank record will appear, allowing you to enter another meter amount and unit of measure.

To delete a meter value, click the associated **Delete** checkbox, then click the **Delete** button. When the confirmation window appears, click **OK** to delete the record(s).

Cal Options Tab (8i Calibration only)


User Information
General
Options
Cal Options
Security
Email Optic
Maintain Calibration Procedure History
Certificate of Calibration Statement
It is hereby certified that the above described instrument conforms to the original manufacturer's specifications and has been calibrated using standards whose accuracies are traceable to the National Institute of Standards and Technology within the limit…
Failure Notice Statement
It is hereby stated that the above described instrument does not conform to the original manufacturer's specifications and has been failed based on accuracies that are traceable to the National Institute of Standards and Technology, and are within the limit…
Save
Cancel

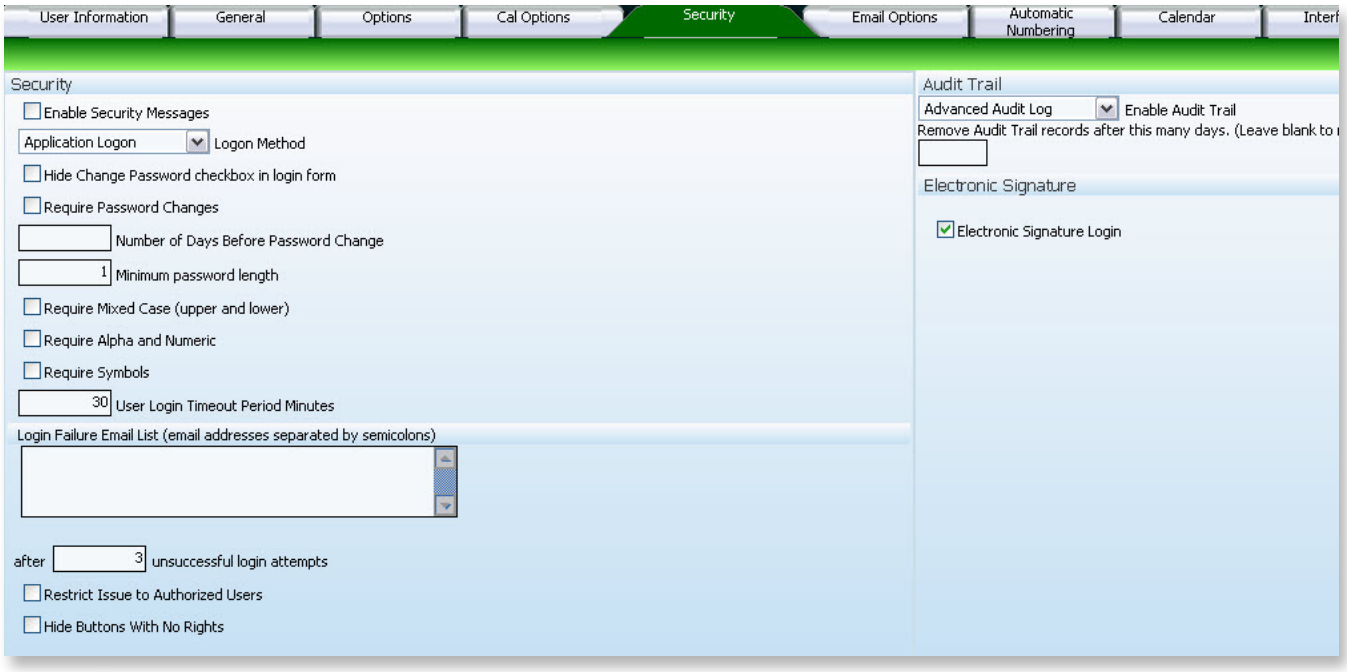
Maintain Calibration Procedure History: If **Maintain Calibration Procedure History** is set to true (checked), then the text of a specific procedure can be edited until it is used in a calibration record. Once it is added to a calibration record, the procedure is locked down so no changes can be made to it. If **Maintain Calibration Procedure History** is set to false (unchecked), then edits can be made any time even if the procedure is used in a calibration.

Certificate of Calibration Statement: The text entered here appears on certificates of calibration when gages pass calibration.

Failure Notice Statement: The text entered here appears on failure notice statements when gages fail calibration.

Security Tab

In this window, you can enable and set options for FaciliWorks' security and audit trail features.



User Login Timeout Period Minutes: The numeric value in this field represents the number of minutes of inactivity allowed before FaciliWorks will automatically log out a user. There is a similar setting within the **System Info -> Usage** screen which overrides the setting here in the **Security** tab. Please see **System Info** for more details.

Logon Method

Use this drop-down list to select the method by which users will log in to FaciliWorks.

- **Windows Logon** uses security from your Windows operating system. When users access FaciliWorks 8i, they will be prompted with the standard Windows Login dialog. Thus, management of users and password is done through the server's local Users and Groups security object. This is disabled under 21 CFR Part 11 implementation of the system.

- **Application Logon** (default setting) uses security specific to the FaciliWorks program; you must set up user IDs and passwords in Security. When you launch FaciliWorks, you will be directed to a Log In screen. For the 21 CFR 11 compliant version of FaciliWorks, this field is locked to **Application Logon.**

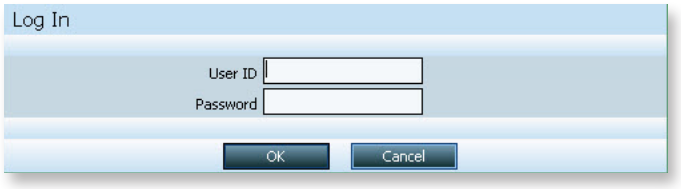
- **ADS Logon:** FaciliWorks 8i can integrate with Active Directory Distributed Systems for the authentication method. Currently, this function works with ADAM (Active Directory Application Mode). Contact Cybermetrics for updated news for compatibility with Windows Active Directory. This is disabled under 21 CFR Part 11 implementation of the system.

- **Web Single Sign On:** FaciliWorks 8i allows the use of third-party SSO authentication methods which utilizes the HTTP Header Variable method. This is disabled under 21 CFR Part 11 implementation of the system.

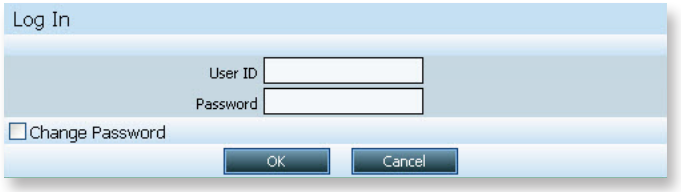
Method	Requires Authentication	Requires Form Entry
Application Logon	Yes	Yes
Windows Logon	Yes	Yes
ADS Logon	Yes	No (Seamless)
Web Single Sign On	Yes	No (Seamless)

Passwords

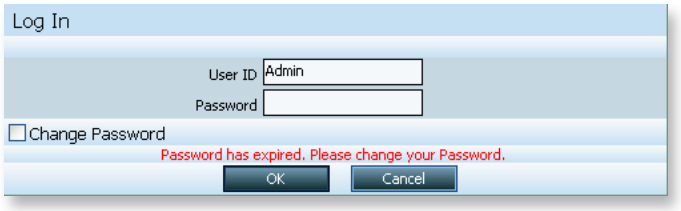
Hide Change Password checkbox in login form: Checking this checkbox will keep users from changing their passwords. When this checkbox is hidden, the **Log In** form will appear as follows:



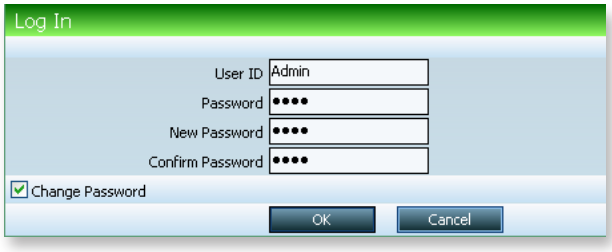
Default **Log In** form:



Require Password Changes: For security reasons, you may want users to periodically change their passwords. Check this checkbox and enter a password change frequency in the **Number of Days before Password Change** field. When this period of time passes, the following log in message will appear:



To change your password, check the **Change Password** checkbox. FaciliWorks will prompt you to enter your old password and then enter and confirm you new password.



Enter those values and click **OK.** You will receive the following message:

Minimum Password Length: Enter the minimum number of digits required for passwords.

Require Mixed Case, Require Alpha and Numeric and Require Symbols: Check these checkboxes to require these characteristics in all passwords. These requirements make passwords difficult to guess, which increases security.

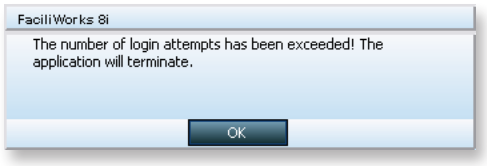
Unsuccessful Login Attempts

FaciliWorks can be configured to dispatch a notification email after a specified number of unsuccessful login attempts are made (use of incorrect User IDs and/or Passwords). The default is three attempts, but this number can be modified. See the **Email Options** tab to define email settings.

Login Failure Email List: Enter the email address of each person to be notified of the unsuccessful login attempts and separate multiple email addresses with semicolons.

After ____ Unsuccessful Login Attempts: Enter the number of attempts allowed prior to an alert being sent to the recipient list.

When this number of attempts has been made, the user will receive the following message:



The email alert will be sent. The user can then click the **OK** button and immediately try again.

Restrict Issue to Authorized Users

Checking the **Restrict Issue to Authorized Users** checkbox will mean that assets can only be issued to users who are specifically authorized to handle them. FaciliWorks requires you to re-login for the changes to take effect. To select the authorized user(s) for each asset, navigate to the **Data Administration -> Assets** menu.

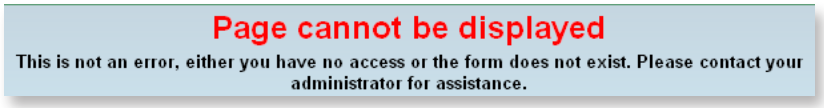
Within an asset record, click the **Auth Persons** tab. Click the **Staff ID** pop-up menu to select the authorized users. Navigate to the **Information** tab. Click the **Usage** button at the bottom of the form. Click the **Issued / Used By EmpTo** pull-down; only those authorized to use the asset are in the list.

Within a gage record (in 8i Calibration only), click the **Issuances** tab. Click the **Staff ID** pop-up menu to select the authorized users. Navigate to the **Information** tab. Click the **Issue/Return** button at the bottom of the form. Click the **Issued / Used By EmpTo** pull-down; only those authorized to use the gage are in the list.

Users with Limited Rights

If the **Enable Security Messages** checkbox is checked, FaciliWorks will display warning messages if users try to perform actions (such as deleting records) for which they don't have permission. If the box is unchecked, users will still be unable to complete any action for which they don't have permission, but no warning messages will be displayed.

By default, when a user's rights are limited, the user will receive the following message when attempting to enter a restricted area:


Page cannot be displayed
This is not an error, either you have no access or the form does not exist. Please contact your administrator for assistance.

If the **Hide Buttons with No Rights** checkbox is checked, the navigation buttons for the areas that are restricted will be hidden from the user. For example, a user with limited rights would not see buttons such as **Personnel** or **Configuration** in the Main Menu.

Audit Trail

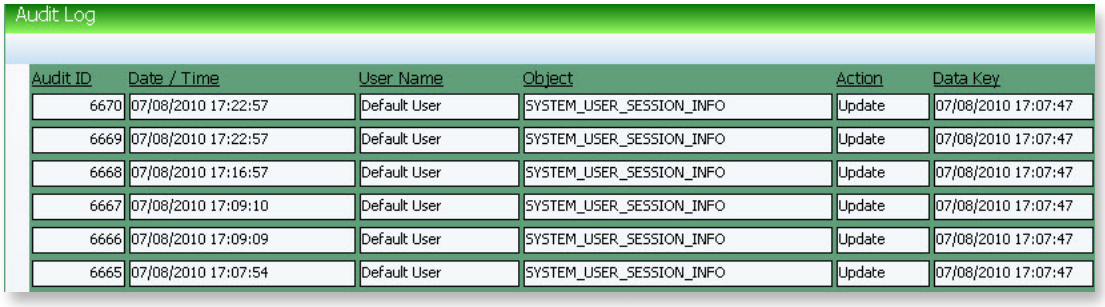
The **Audit Trail** records the actions performed within the program, such as record modifications and deletions, the date and time of each action and the name of the user who performed each action. The preferences for this feature are set here in the **Security** tab, but the **Audit Log** is accessed from the **Utilities** menu.

In the **Enable Audit Trail** pull-down list, choose from the following options:

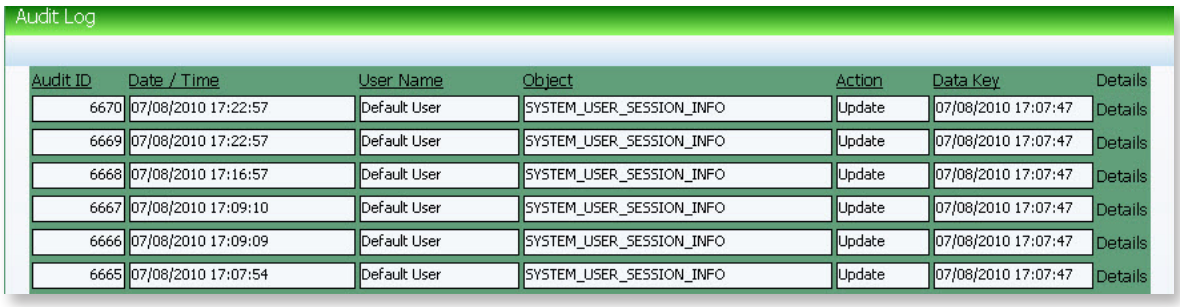
- No Audit Log
- Basic Audit Log
- Advanced Audit Log

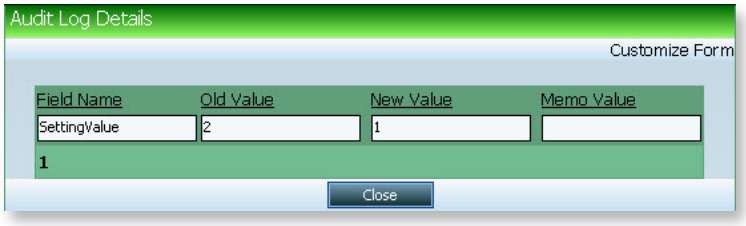
Choose **No Audit Log** if you prefer not to keep track of record modifications, etc.

Choose **Basic Audit Log** to keep track of date and time, user name, record accessed, action performed and data key:


Audit Log
Audit ID
Date / Time
User Name
Object
Action
Data Key
6670 07/08/2010 17:22:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47
6669 07/08/2010 17:22:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47
6668 07/08/2010 17:16:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47
6667 07/08/2010 17:09:10 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47
6666 07/08/2010 17:09:09 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47
6665 07/08/2010 17:07:54 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47

Choose **Advanced Audit Log** to be able to view all of the above details plus have the option to click **Details** (to the right of each record) to view data values before and after each modification:


Audit Log
Audit ID
Date / Time
User Name
Object
Action
Data Key
Details
6670 07/08/2010 17:22:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details
6669 07/08/2010 17:22:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details
6668 07/08/2010 17:16:57 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details
6667 07/08/2010 17:09:10 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details
6666 07/08/2010 17:09:09 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details
6665 07/08/2010 17:07:54 Default User SYSTEM_USER_SESSION_INFO Update 07/08/2010 17:07:47 Details



Remove Audit Trail Records after this many days: Enter the number of days of **Audit Trail** data to store. FaciliWorks will automatically purge data older than this value. For example, enter 7 to keep the last week's **Audit Trail** data. Enter 0 to keep a comprehensive audit trail record.

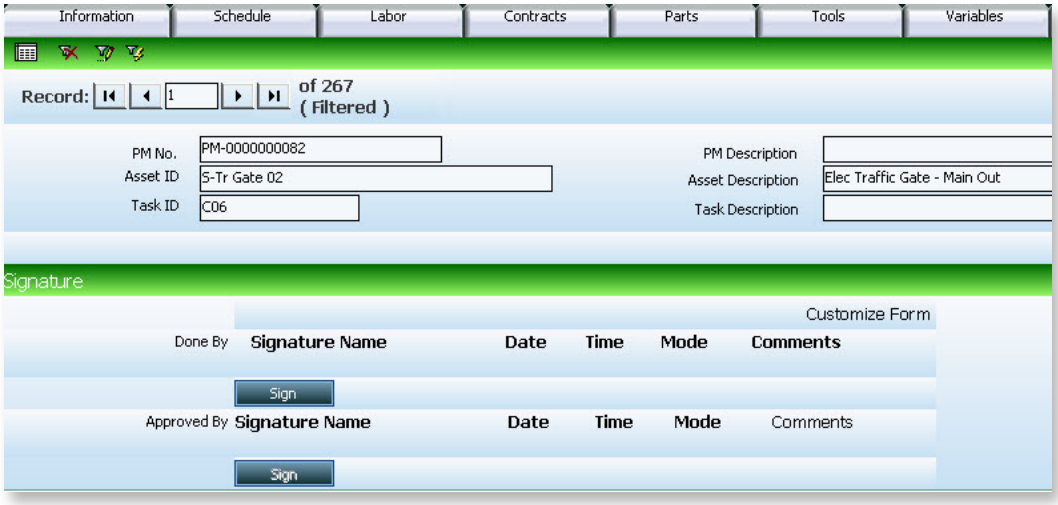
NOTE: If you have installed the 21 CFR 11 compliant version of FaciliWorks, the Advanced Audit Log is permanently enabled.

Electronic Signature Login

Check the **Electronic Signature Login** checkbox to require a user to enter his User ID and Password in order to sign a record. When a PM or work order is completed and the record is saved, FaciliWorks will prompt you to go to the **Signature** tab to sign off on the order.

NOTE: If you have installed the 21 CFR 11 compliant version of FaciliWorks, Electronic Signature Login is permanently enabled.

For instance, in a PM record, on the **Signature** tab, a user clicks the **Sign** button (in the **Done By** pane) to signify that he has completed the work on that PM.

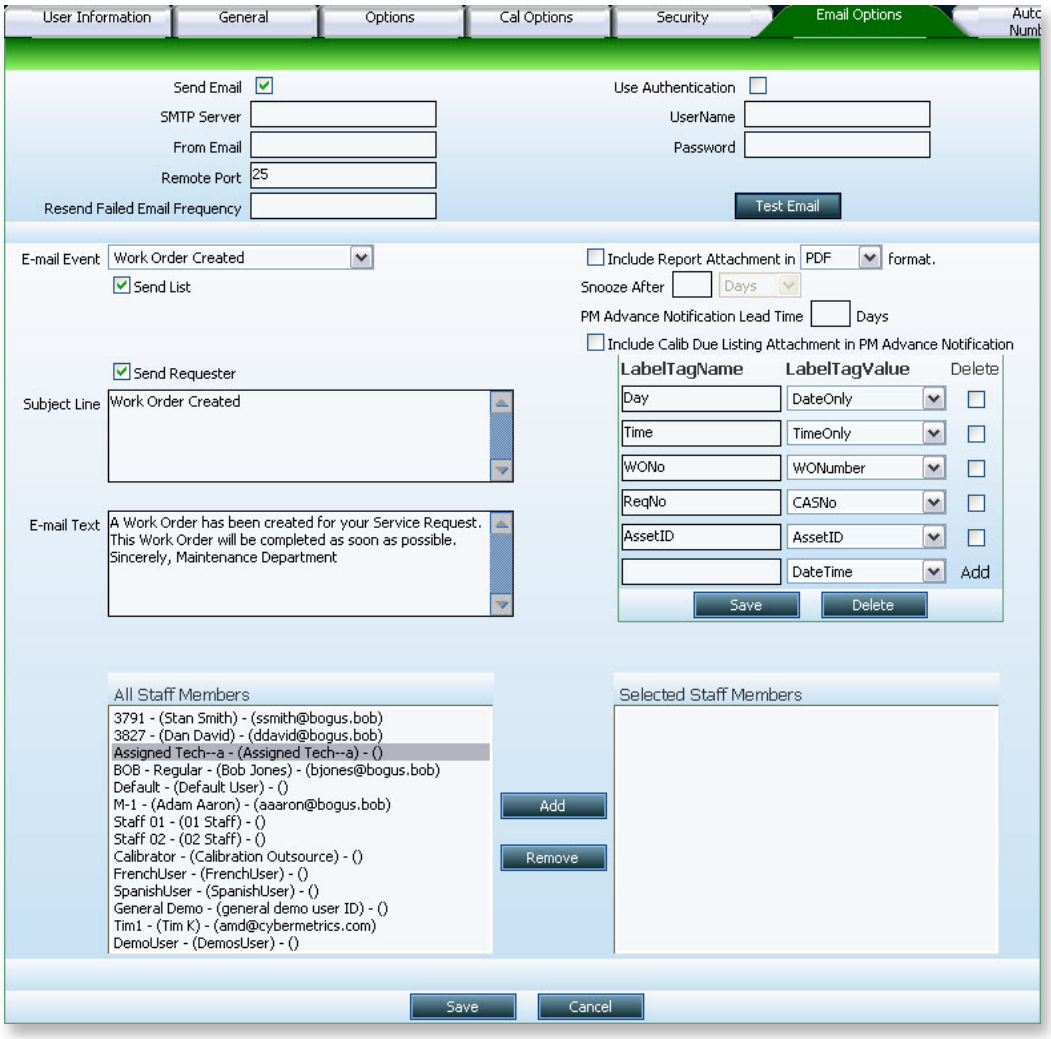


When **Electronic Signature Login** is enabled, the following window will appear requiring that the user sign in with his User ID and Password in order to sign the record:

If **Electronic Signature Login** is disabled and a user clicks the **Sign** button, the signature record is automatically populated with the user's name from the initial login screen and the current date and time.

Email Options Tab

The automatic email notification feature is designed to send emails to a user who creates a service request or to a list of users triggered by a specific event within the service request process. Sample email text has been created for various steps in the service request-work order process.



In order for the email notification feature to function properly, email options must be defined here.

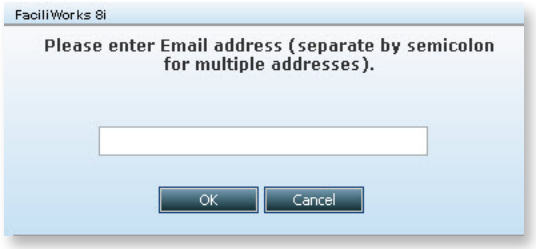
1. Check the **Send Email** checkbox.
2. Enter <name of server> in the **SMTP Server** field.
3. Enter <email address> in the **From Email** field.
4. Enter <port number> in the **Remote Port** field.

If your mail server requires authentication of your account, check the **Use Authentication** checkbox and fill in the User Name and Password fields. If you do not know these values, ask your system administrator.

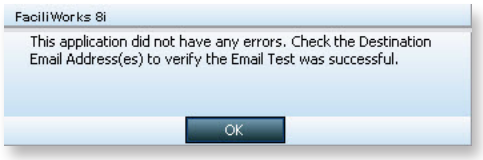
After any changes, remember to click the **Save** button.

Resend Failed Email Frequency: Enter the number of times that FaciliWorks will try to resend an email if the original sending fails.

Test Email: Click this button to send a test email from FaciliWorks. The following dialog will appear prompting you to enter an email address to send the test message:



Enter an email address and click the **OK** button to send the test email. If the email was successfully sent, you will receive the following message:


FaciliWorks 8i
This application did not have any errors. Check the Destination Email Address(es) to verify the Email Test was successful.
OK

Click **OK** to continue.

Email Event: From the drop-down list, select an event that will trigger email notification. With that choice made, enter a subject line and email text for this event or use the sample text provided.

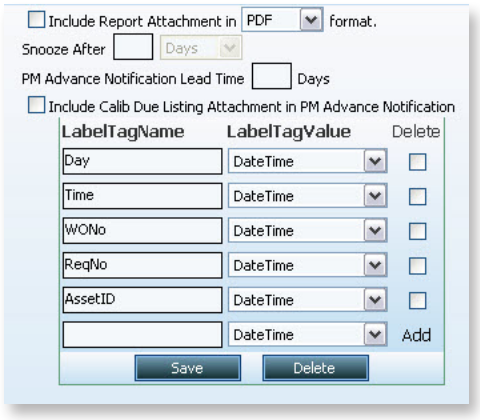
Click the **Send List** checkbox if this notification should be sent to a list of users. To select users to receive the email notification, select a staff member's name in the **All Staff Members** list and click the **Add** button. The name is transferred to the **Selected Staff Members** list.

Click the **Send Requester** checkbox if this email notification should be sent to the person who submitted the service request.

Click **Save** after any changes.

Each email event can have its own settings and recipient list. To set up a second email event, make another selection from the **Email Event** drop-down list and specify your preferences in each field as stated above.

When the PM Advanced Notification event is selected from the **Email Event** drop-down list, a number of options are available. If you would like a report sent within the email to the email recipients, click the **Include Report Attachment in ___ Format** checkbox and select a file type from the associated drop-down list. To include calibrations in this list (8i Calibration only), click the **Include Calib Due Listing Attachment in PM Advance Notification** checkbox.



Enter a numeric value in the **Snooze After** _____ field and select a unit of time from the drop-down list. This feature will delay the sending of the notification by the amount of time specified in these fields.

Enter a numeric value in the **PM Advance Notification Lead Time** ____ **Days** field. For example, if your maintenance team needs to know which PMs are due over the next two weeks, enter 14 in this field.

LabelTagName and **LabelTagValue:** The items listed here will be included in the body of the email. To delete an item from this list, check the **Delete** checkbox associated with the row and then click the **Delete** button.

Automatic Numbering Tab

Use this form to create the automatic numbering formats for your work orders, PMs, service requests, requisitions, purchase orders, assets and gages. (Gage ID numbering is only available with 8i Calibration.) For your convenience, basic instructions and codes are listed on the right side of this screen, including notes about date formats.

To enable this function, scroll to the bottom of this form and check the **Enable Automatic Numbering for Asset ID and Numbering Schemes** checkbox.

Your number formats can include numbers, letters, day of the week, dates or a combination thereof. For formats utilizing months or days in their letter format (Mon, Jan), you must use lowercase letters in your format scheme.

For example, you can create a work order numbering system that includes the code WO (for Work Order), the day of the week on which the work order is created and a sequential number using the format WO-ddd-###. In this example, the sample work order number would be WO-MON-014.

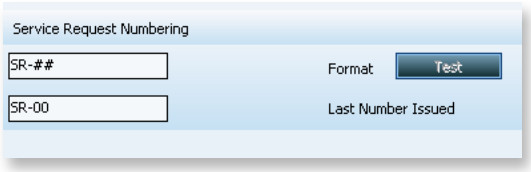
You can also create a format that uses the current date for the number, such as yyyymmdd##. Then, for work orders created on May 10, 2010, the first work order number would be 2010051000; the tenth number would be 2010051010.

Here are some basic tips for creating your numbering formats:

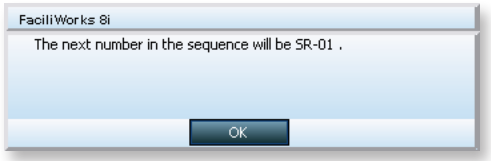
- Use all capital letters for those letters to appear on every generated number.
- Use the # symbol for incremental digits.
- Use the ? symbol for incremental letters.
- Use the code “dd” for the numerical day of the month created.
- Use the code “ddd” for the day of the week created (Mon, Tue, etc.).
- Use fewer than 21 characters in your numbering format to ensure that the numbers will fit on your reports.

To start your numbers with A or 0, use the # and ? symbols in your format. For example, if you enter ??-# # in this screen, your first purchase order number would be AA-00. Following this numbering scheme, after number AA-99 is generated, the next number generated would be AB-00. After number AZ-99 is generated, the next number generated would be BA-00 and so on.

To start your numbers with a specific number and/or letter code, enter the last exact number in the **Last Number Issued** textbox. For example, if you entered SR-00 in this field, the next number generated would be SR-01.



Click the **Test** button to see a preview of the next number in the sequence, based on the format you’ve created.

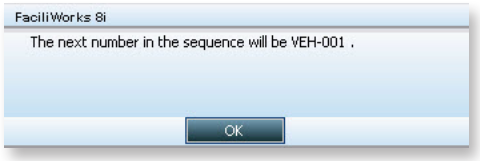


NOTE: Once FaciliWorks creates an automatic number, it will not reissue that number. For example, if you create a new record in Purchase Orders, FaciliWorks automatically generated a new purchase order number. If you then decide to close that record without saving it, FaciliWorks will not regenerate that number for the next new purchase order; it will generate the next number in the sequence.

The **Numbering Schemes** pane is used to define the schemes for types of assets, parts, staff members and gages (schemes for gages are only available with 8i Calibration). If you set up multiple numbering schemes, use the record navigation bar at the bottom of that pane to browse through the records.

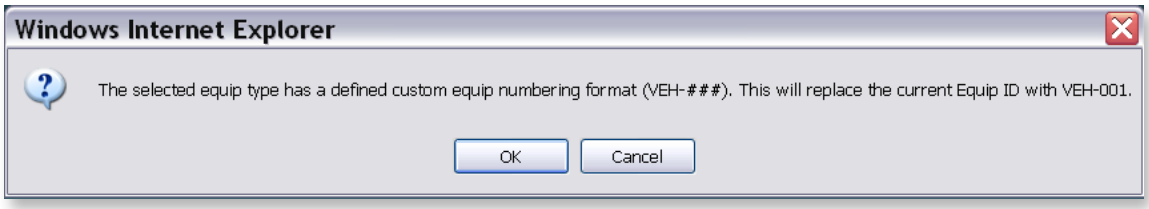
Suppose you have 10 types of assets, one of which is **Vehicle.** You can create a numbering scheme specific to vehicles. For example, select **Asset ID** from the **Number Field** drop-down list and then select **Vehicle** from the **Asset Type** pop-up list (your **Types** list must already be in your database). Enter a **Number Format** and **Last Number.**

Click the **Test** button to receive the following message:

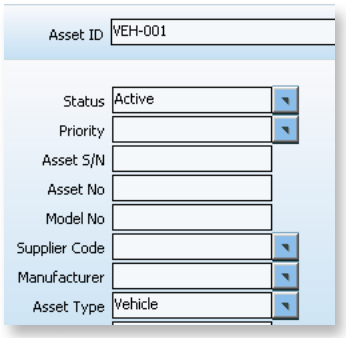


Click **OK** to continue. Save the new format.

To add a new vehicle asset using the new numbering format, navigate to **Data Administration -> Assets** and click the **New Asset** button. Click the **Asset Type** pop-up and select Vehicle; the following message displays:

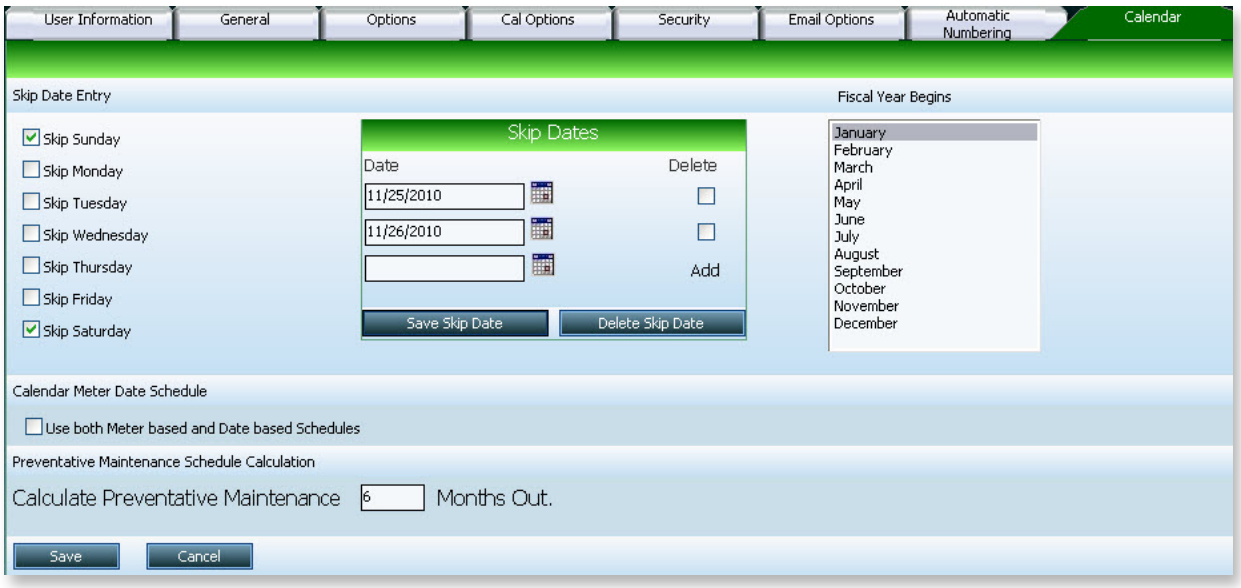

Windows Internet Explorer
The selected equip type has a defined custom equip numbering format (VEH-###). This will replace the current Equip ID with VEH-001.
OK
Cancel

Click **OK.** FaciliWorks inserts the newly generated number into the **Asset ID** field.



Calendar Tab

The **Calendar** tab within **Admin Settings** allows you to define certain dates and days of the week that you want to skip. These can be weekends, holidays, vacation periods or plant shutdown periods.



FaciliWorks automatically sets the next maintenance due date of an asset based on a user-defined frequency. If the next due date must fall on a weekday, FaciliWorks has a **Skip Date** feature which will force a due date to the last working day before a skipped day.

Skip Days of the Week

Each day of the week is listed with a corresponding checkbox; check the box to skip the day. To change the order of this list, navigate to **Configuration -> Global Settings** and using the **Select Start of Week** drop-down list, select your preference. The selected day will be listed first in the **Calendar** tab and it will be the first column in the **Maintenance Jobs Calendar** and all calendar field pop-ups. The image above is the product of having chosen Sunday as the preferred **Start of Week.**

Skip Dates

In the **Skip Dates** pane, type the date into the **Date** field or click the calendar icon to the right of the field to select the date. Click the Save Skip Date button. Clicking this button inserts a new blank field in which you may enter another date to skip. After each date entered, click the **Save Skip Date** button. To delete a date, click the corresponding **Delete** checkbox, then click the **Delete Skip Date** button.

Note: If a calculated maintenance due date falls on a skipped day or date using the Calculate Next Date Due button, FaciliWorks reschedules it for the first working day prior to the skipped day(s). However, if the maintenance due date has been manually entered, then FaciliWorks won't apply this skip day rule.

Note: The calendar shows maintenance of assets that have exceeded their meter time as due on the current date, regardless of whether or not it is a skipped day.

Note: When you complete a work order, if the skip days or skip dates cause the next due date to occur on or before the date on which you completed the work order, then the next date due moves to the next available date after the skipped days or dates. For example, if a work order that must be completed daily (a one-day frequency) is completed on Friday, and Saturday and Sunday are skipped days, then the next maintenance would be due on Monday. However, if a work order with a frequency of two or more days is due on a Saturday or Sunday, and those days are skipped days, the maintenance will be due on the preceding Friday.

Fiscal Year Begins: Select the month in which your company's fiscal year begins. FaciliWorks uses this information in calculating budgets.

Calendar Meter Date Schedule

Check the **Use both meter-based and date-based schedules** checkbox to use both meter-based and date-based schedules. If this checkbox is not checked, FaciliWorks uses date-based schedules only.

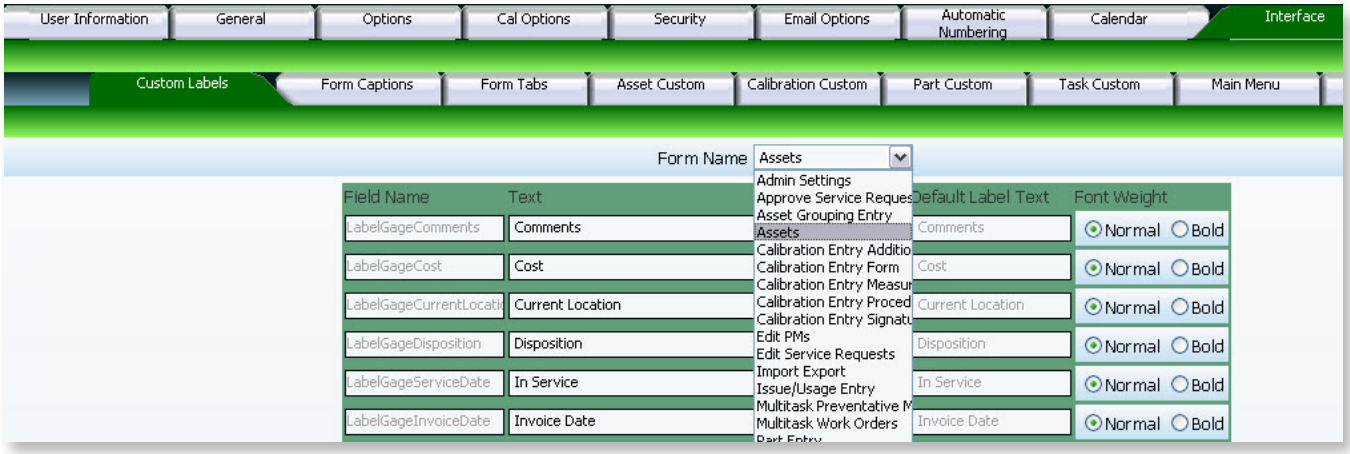
Calculate Preventative Maintenance ____ Months Out: Enter a numeric value in this field. Using a large number may unnecessarily use up system resources.

Interface Tab

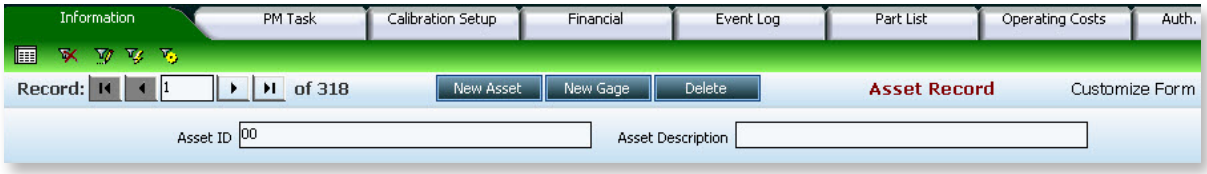
The interface settings permit you to customize labels and captions for forms throughout FaciliWorks. Each form that has a **Customize Form** link in the upper right-hand corner can also be altered within the **Interface** tab.

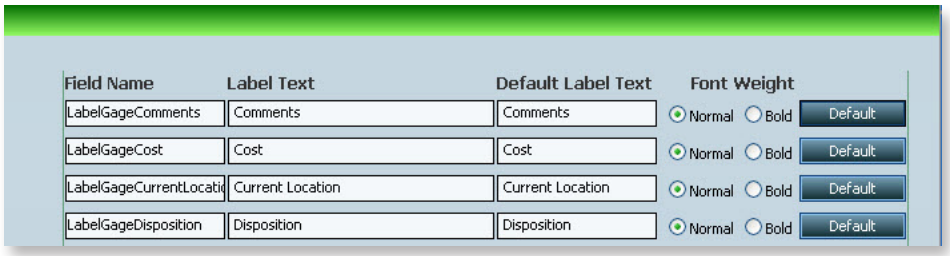
Custom Labels Sub-tab

Use the **Form Name** drop-down list to select a form whose labels you would like to customize.



Selecting Assets, for example, will open the same list of labels here as it would if you clicked **Customize Form** from within the **Assets -> Information** tab.





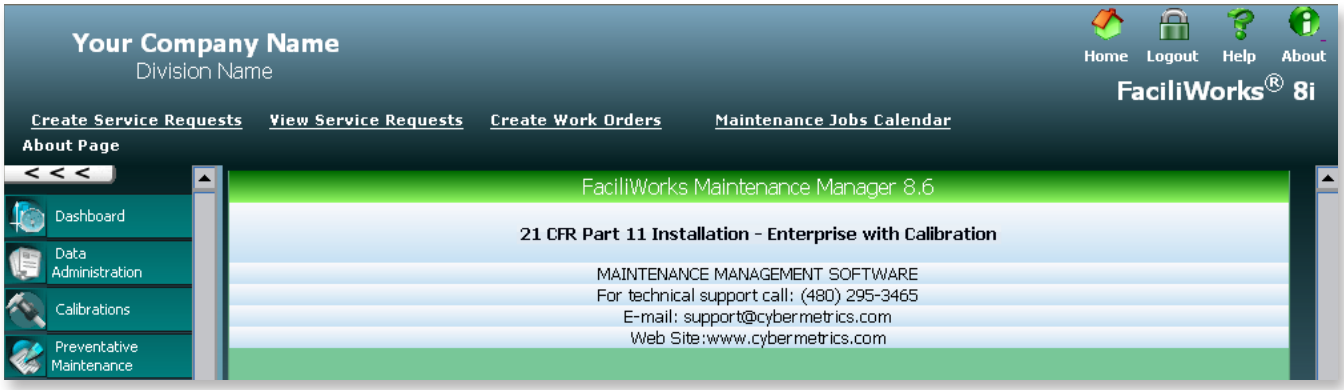
To change a label, highlight the contents in **Label Text** and type in the desired text. Use the **Normal** and **Bold** radio buttons to set the preferred font weight. To revert to the default FaciliWorks labels for a particular field, click the associated **Default** button. After any changes, be sure to click the **Save** button at the bottom of the form.

Scroll to the bottom of this screen to the **Report Label Options** pane. Click the **Open Normally** radio button if you would like your reports to use your customized label text. To use the default text, click the **Open with Default Label Text** radio button.

Form Captions Sub-tab

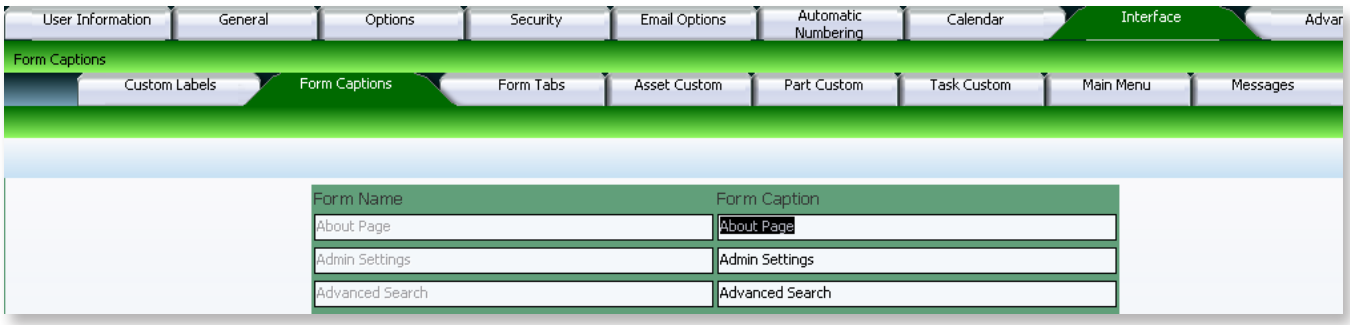
Use the **Form Captions** sub-tab to change the display names of various forms and navigation buttons. Some items in this list are also found in the **Main Menu** sub-tab; if a change is made to a name in one tab, it is reflected in the other tab as well.

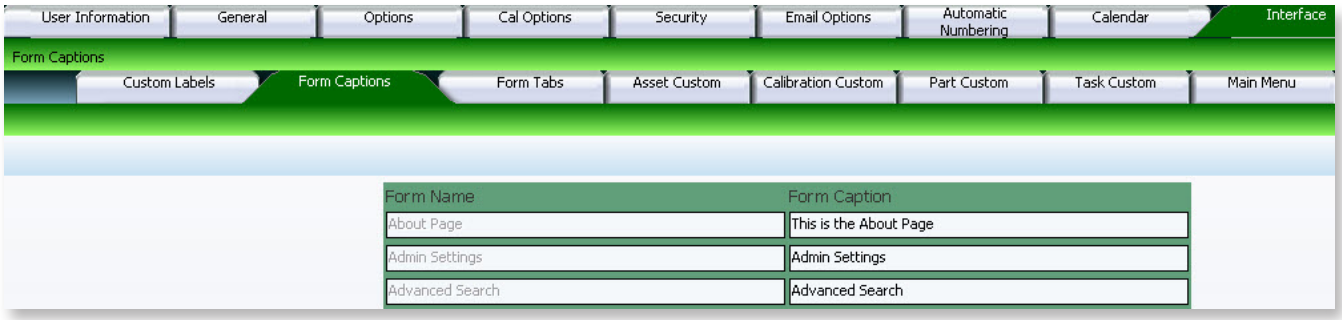
To see an example of a change made within the **Form Captions** sub-tab, click the **About** icon in the upper right corner of the program window.



Notice that the name of this form is **About Page** (displayed on the left side of the window, above the Main Menu.

Navigate to **Configuration -> Admin Settings -> Interface -> Form Captions** sub-tab. The first form in the list is **About Page.** In the **Form Caption** field of that row, replace **About Page** with **This is the About Page.** Click the **Save** button at the bottom of the form.





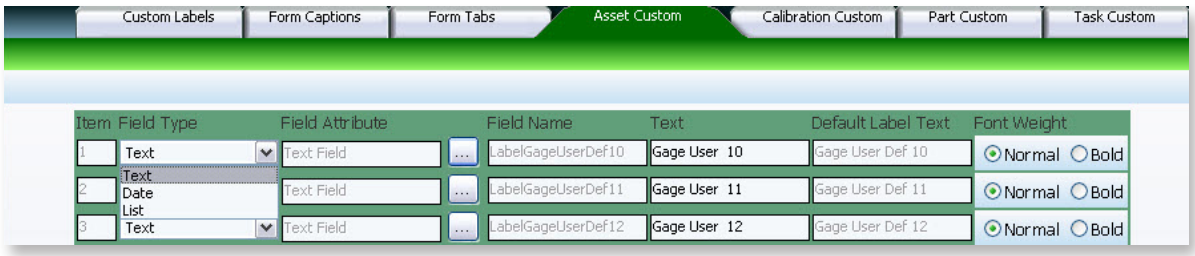
Click the **About** icon in the upper right corner of the screen and see that the new name of this form that you just entered is now displayed above the Main Menu.

Form Tabs Sub-tab

From the **Form Name** drop-down list, select the form whose tab names you would like to change. In the **Tab Caption** field, overwrite the existing contents with your preferred text and click the **Save** button.

Asset Custom Sub-tab

Field types, field text, attributes and font weight for the user-defined fields within Assets (and Gages in 8i Calibration) can be customized in this section.

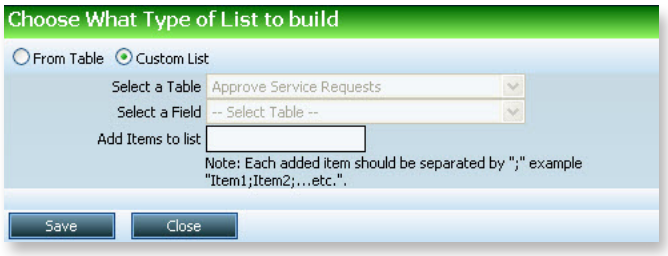


Use the **Field Type** drop-down list to select the type of field: Text, Date or List. **Text** fields can contain letters and/or numbers, **Date** fields can only contain properly formatted dates and **List** fields have associated pop-up lists from which field contents are chosen. Please see the **Admin Settings -> Advanced** tab for more information on customizing pop-up lists.

In the **Text** field, enter the name of your custom field as you would like it to appear on a form.

Use the **Font Weight** radio buttons to specify your text weight preference.

If you've chosen to create a **List** field, click the **[...]** button associated with the field. The following window will open, allowing you to specify the items within the new list:



If you click the **From Table** radio button, the two drop-down lists become active: Select a Table and Select a Field; the **Add Items to List** field becomes inactive. Selecting a table activates choices for the field. Creating a list from a table allows you to use existing FaciliWorks lists for your new List field.

To create a custom list, click the **Custom List** radio button; this activates the **Add Items to List** field. Enter multiple list items by separating them with semicolons; do not insert spaces between list items.

Click **Save** and close the window. Also be sure to click **Save** at the bottom of the **Asset Custom** form after any changes.

Changes made to asset fields appear in the **Data Administration -> Assets -> User Defined** tab; changes made to gage fields (8i Calibration only) appear in the **Data Administration - > Assets** (Show All Gages) **-> Additionals** tab.

Calibration Custom Sub-tab (8i Calibration only)

Customizing user-defined fields here works the same way as in **Asset Custom.** Please refer to the **Asset Custom** sub-tab section for details. Field changes made here are displayed in the **Calibrations -> Calibration Entry -> Additionals** tab.

Part Custom Sub-tab

Customizing user-defined fields here works the same way as in Asset Custom. Please refer to the **Asset Custom** sub-tab section for details. Field changes made here are displayed in the **Inventory -> Part Entry -> User Defined** tab.

Task Custom Sub-tab

Customizing user-defined fields here works the same way as in **Asset Custom.** Please refer to the **Asset Custom** sub-tab section for details. Field changes made here are displayed in the **Data Administration -> Tasks -> User Defined** tab.

Main Menu Sub-tab

This form allows you to customize your menu names. Use the drop-down list at the top of the form to select a menu.

- **Top Links** are the four icons in the upper right corner of the program window.
- **Navigation Menu** includes the list of buttons on the left-hand side of the program window.
- **Main Menu** items are the objects shown after clicking an item in the **Navigation Menu.**

Message Sub-tab

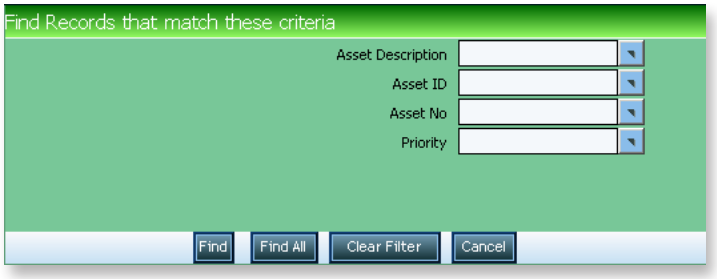
This form is used to change titles and text of various FaciliWorks messages. HTML code can be used in these fields to dictate font color, etc.

Advanced Tab

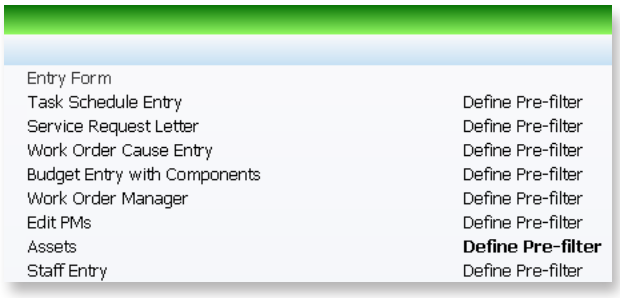
This form is used to define pre-filters for entry forms and to limit and detail the self-building pop-up lists such as task priority, manufacturers, etc.

Define Pre-filter

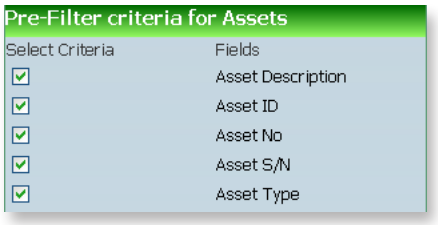
Define the pre-filter items used to search database records. For example, the current asset record **Quick Filter** contains four fields:



To modify the pre-filter, navigate to the **Configuration -> Admin Settings -> Advanced** tab. Click the **Define Pre-filter** link to the right of the entry form you want to modify.



A **Pre-filter Criteria for Assets** window will open to display a list of all fields by which the asset records can be filtered when using the **Quick Filter** function.



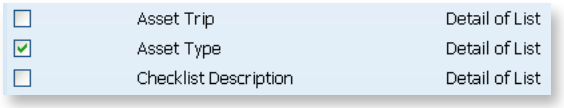
In the pre-filter window, click the checkbox associated with the fields to be included on the pre-filter. Click the **Save** button at the bottom of the window to save any changes and close the window when finished.

Navigate to the **Data Administration -> Assets -> Information** tab and click the **Quick Filter** icon. The **Quick Filter** now contains the **Asset S/N** and **Asset Type** fields that can be used to filter asset records.

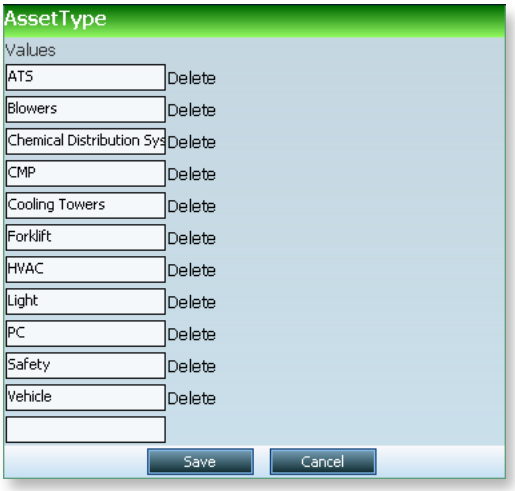
Detail of List

For each self-building list within FaciliWorks, items can be added to the list and the list can be locked down. Navigate to the **Configuration -> Admin Settings -> Advanced** tab and scroll to the lower portion of the form.

If you want to lock down a list, click the **List Limit** checkbox to the left of the list name. This action deactivates the field textbox on the form and forces the user to select an item from the pop-up menu.



Click the **Detail of List** link associated with a list name, for example, **Asset Type.** A window will open that lists all available values (if any).

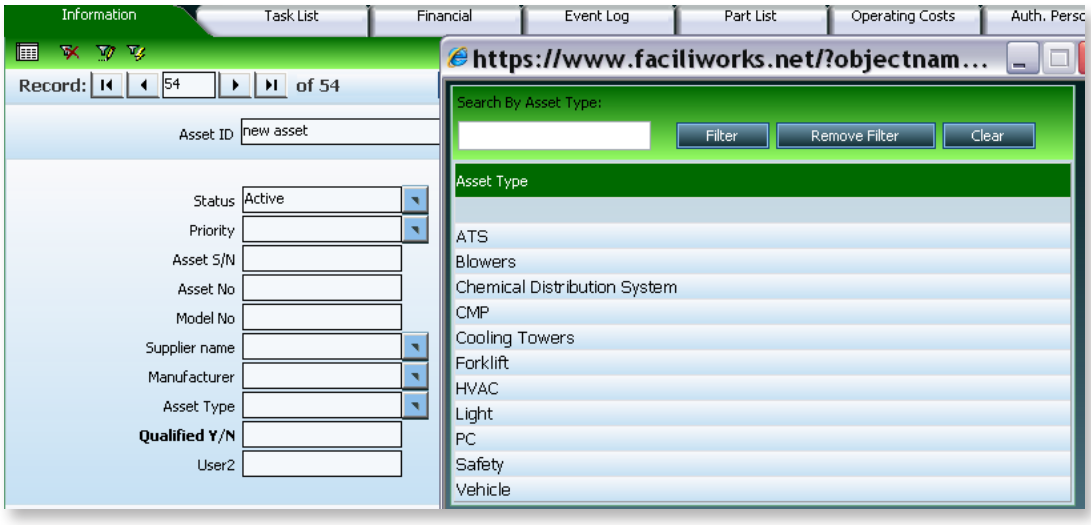


To delete an item from the list, click **Delete** (to the right of the item).

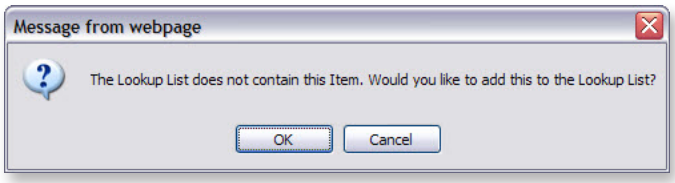
To add an item to the list:

1. Scroll to the bottom of the list and in the **Values** field, type a new item for the list (Vehicle).
2. Click the **Save** button and the new item will be alphabetized in the list.
3. Close the window to return to the **Advanced** tab.
4. Navigate to the **Data Administration -> Assets -> Information** tab and click the pop-up list icon for the **Asset Type** field.

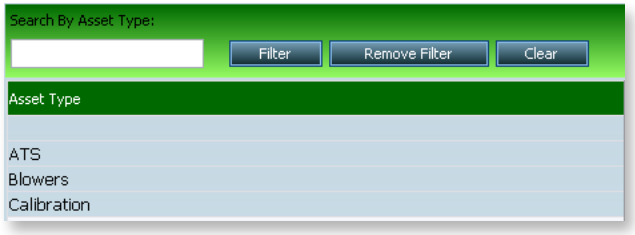
5. The pop-up list now contains our new item, **Vehicle:**



There is another way to add an item to a pop-up list. For this example, uncheck the **List Limit** checkbox for the **Asset Type** list and click **Save.** Navigate to the **Data Administration -> Assets -> Information** tab. In the **Asset Type** field, enter a value that is not currently in the pop-up list, for example, **Calibration.** The following dialog will open:



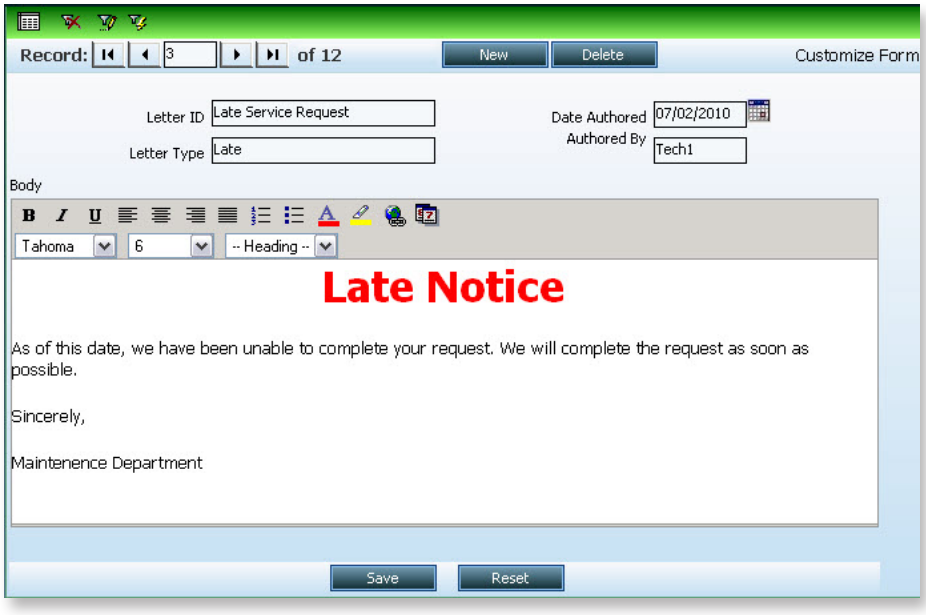
6. Click **OK** to add the new item.
7. Return to the **Configuration -> Admin Settings -> Advanced** tab and click the **Detail of List** link for **Asset Type.** The new asset type value is now in the list.



Adding a value to a pop-up list in this manner is something that can be done by any user from within the individual forms unless the lists are locked down.

Service Request Letter

To create or edit service request letters, navigate to **Configuration -> Service Request Letter.**

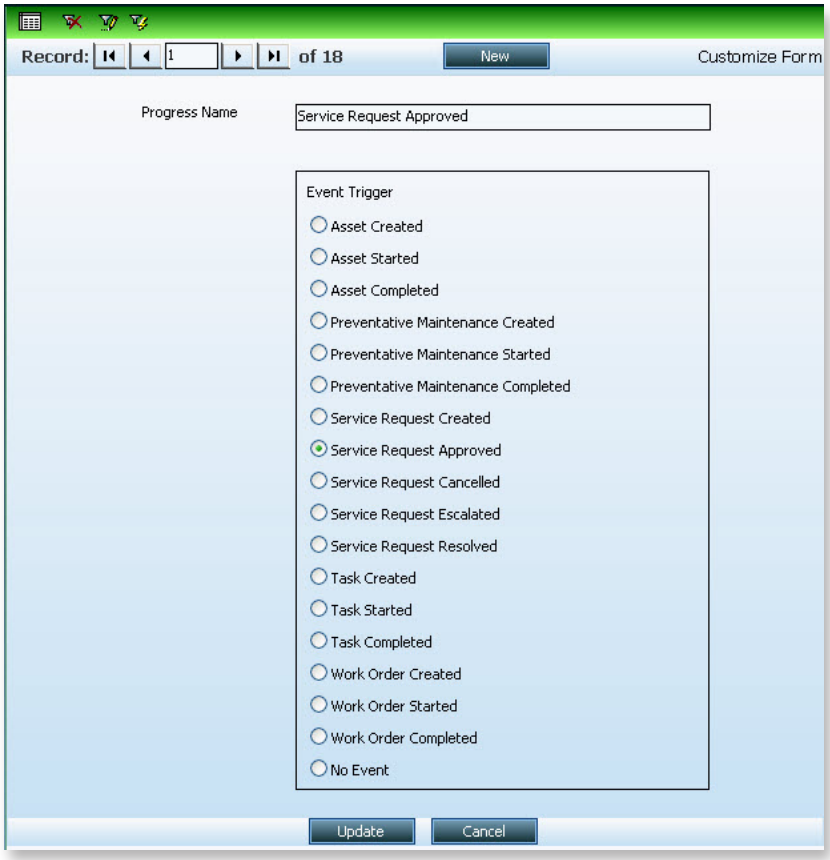


In the letter entry screen, enter the **Date Authored, Authored By** and **Body** of each letter. Character and paragraph options are available.

Use the record navigation bar to locate an existing record, click the **New** button to create a new letter or click the **Delete** button to delete the currently displayed record.

Maintenance Job / Service Request Progress

Navigate to **Configuration -> Maintenance Job / Service Request Progress** to create and edit the progress names that FaciliWorks displays in work orders (the **Work Orders -> Work Order Manager -> Information** tab) and service requests (the **Service Requests -> Edit Service Requests -> Information** tab).



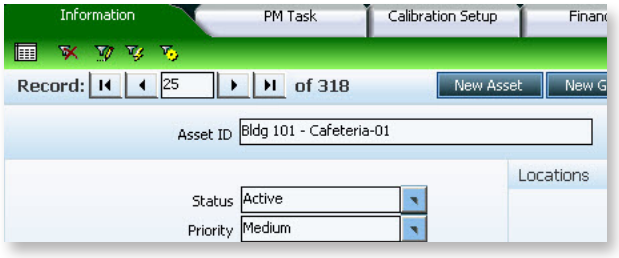
The **Progress Name** (status) displayed in each work order and service request changes automatically as the work order or service request goes through the steps in the process.

The **Event Trigger** radio buttons indicate when FaciliWorks will automatically change the status of a service request or work order.

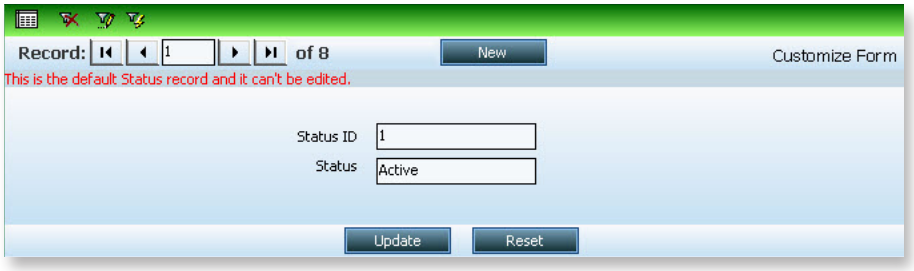
Click the **New** button to create a new progress name; click **Update** to save changes; click **Cancel** to discard changes.

Asset Status

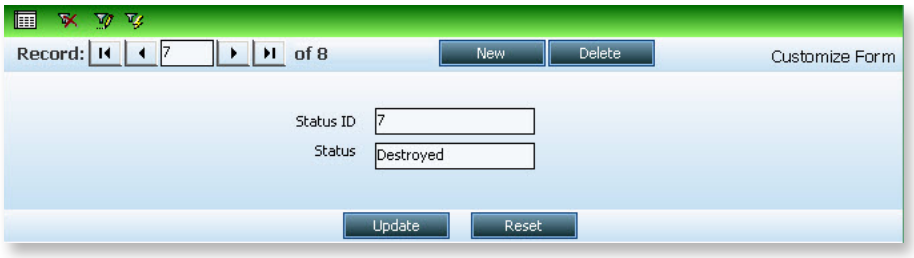
The asset **Status** field (found in the **Data Administration -> Assets -> Information** tab) is user-defined.



Navigate to **Configuration -> Asset Status** to create new **Status ID** records or to edit existing records. The record for **Status ID 1** cannot be edited or deleted. This ID tells FaciliWorks that the asset is currently in use. Only assets marked with this status will appear on lists of assets due for maintenance and on automatic work orders.



To edit an existing record, use the record navigation bar to locate the record and edit as necessary. Click the **Update** button to save any changes.



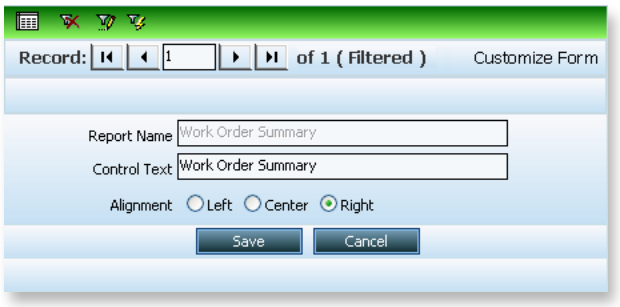
To create a new record, click the **New** button. Enter an ID in the **Status ID** field and a description in the **Status** field.

Some examples of status descriptions are: Inactive, Out for Repair, Backup/Spare, Lost or Retired.

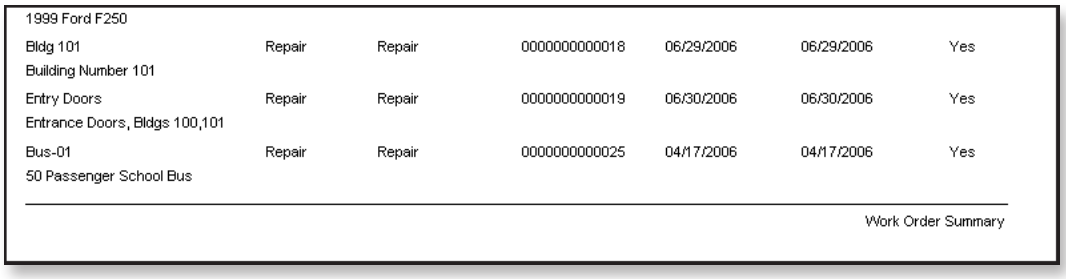
Click the **Update** button to save any changes. To discard any changes made since the last save, click the **Reset** button.

Report Control

If your company must comply with ISO or QS 9000 Document Identification and Control requirements, you can set up FaciliWorks to identify each report with a document control number. To use this feature, navigate to **Configuration -> Report Control.**


Record: 1 of 1 (Filtered) Customize Form
Report Name Work Order Summary
Control Text Work Order Summary
Alignment Left Center Right
Save Cancel

The **Report Name** will appear at the bottom of each report, using the alignment you have chosen for each report (left, center or right). In the **Control Text** field, enter your control text for each report. If you aren't required to use control text, you may enter any other information you want to appear at the bottom of your reports, such as your company address. Be sure to click **Save** after any changes.


1999 Ford F250
Bldg 101 Repair Repair 0000000000018 06/29/2006 06/29/2006 Yes
Building Number 101
Entry Doors Repair Repair 0000000000019 06/30/2006 06/30/2006 Yes
Entrance Doors, Bldgs 100,101
Bus-01 Repair Repair 0000000000025 04/17/2006 04/17/2006 Yes
50 Passenger School Bus
Work Order Summary

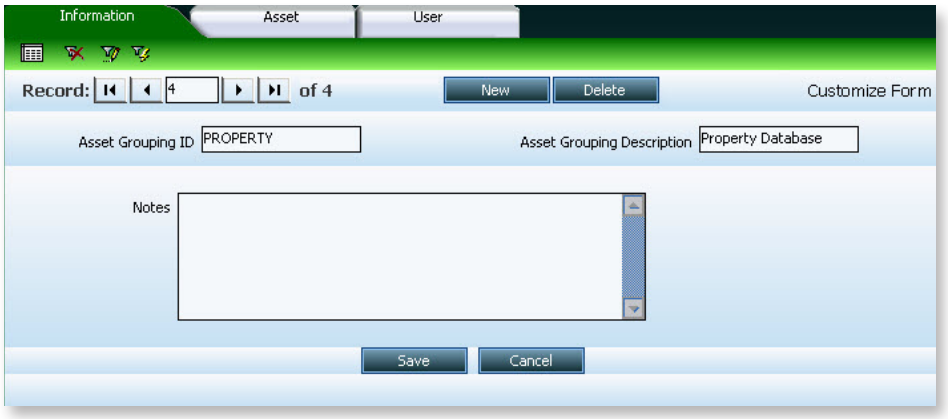
Click the **Datasheet View** icon in the upper-left corner of the **Report Control** screen to see the records in table format.

Asset Grouping Entry

In a company with multiple divisions, asset grouping can be used to partition the shared database - one for each division. Doing this allows each division to view only the assets that pertain to that division. The asset grouping can be applied to separate assets by location, department or by individual staff groups.

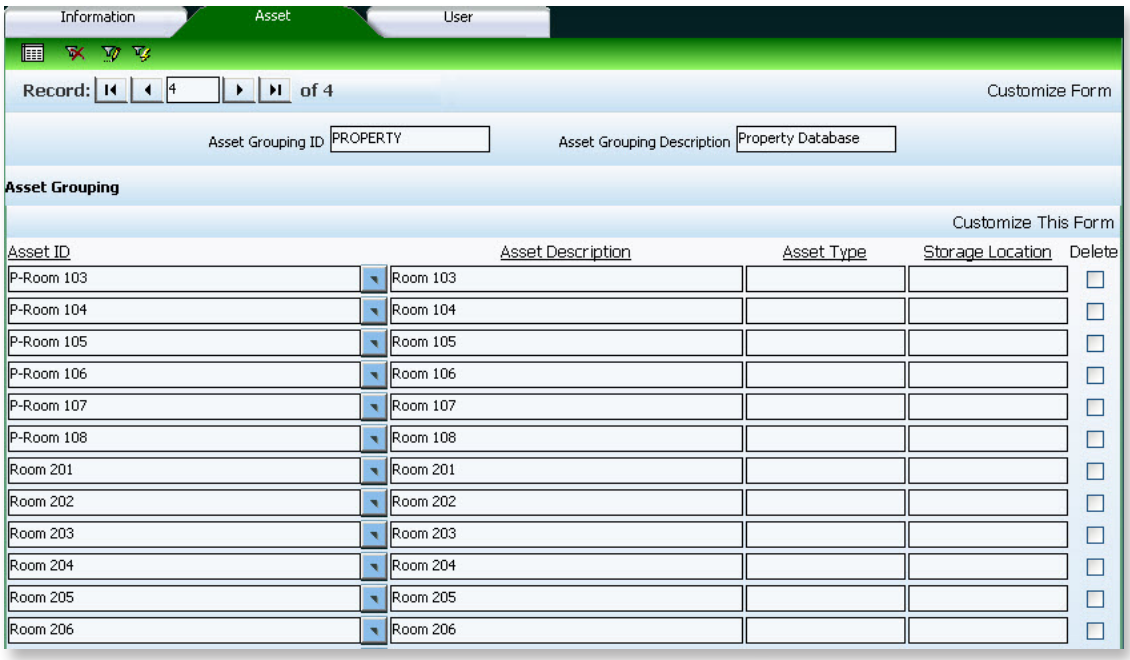
Information Tab

To create a new group, click the **New** button. Enter an **Asset Grouping ID** and **Asset Grouping Description** in this screen along with any applicable notes. Click the **Save** button to save the new record.



Asset Tab

In this tab, assign multiple assets to be used by the group specified at the top of the form.



Click the **Asset ID** pop-up list icon; the list will look similar to the following:

Check the **Select** checkboxes associated with the assets you want to add to the group and then click the **Add** button at the bottom of the window. Navigate to the next page of assets by clicking the next page number at the bottom of the window.

To add all assets to the asset group list, click the **Select All** button and then click the **Add** button.

When you select the desired assets and click the **Add** button, the list will close and the fields within the **Asset** tab will auto-fill. At the bottom of the last page will be an empty **Asset ID** field. Use the pop-up list in the empty field to go through the process again to add more assets to the group, if necessary.

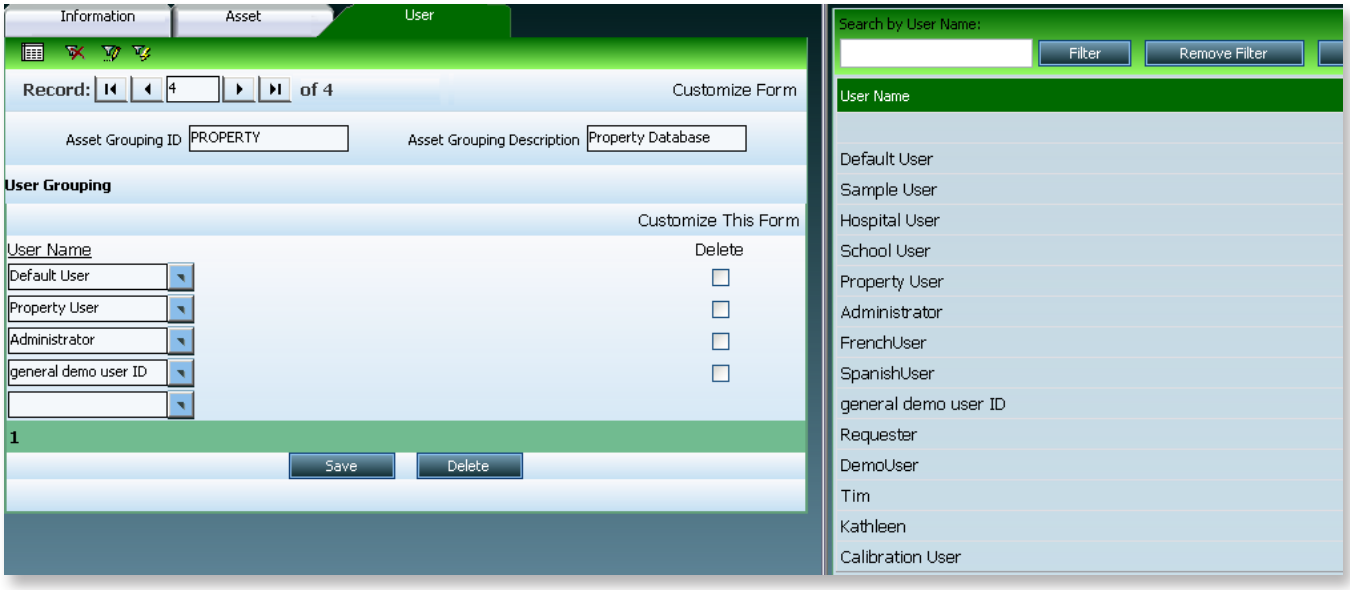
Be sure to click **Save** at the bottom of the **Asset** tab after any changes.

To delete an asset from the list, check the associated **Delete** checkbox and click the **Delete** button.

User Tab

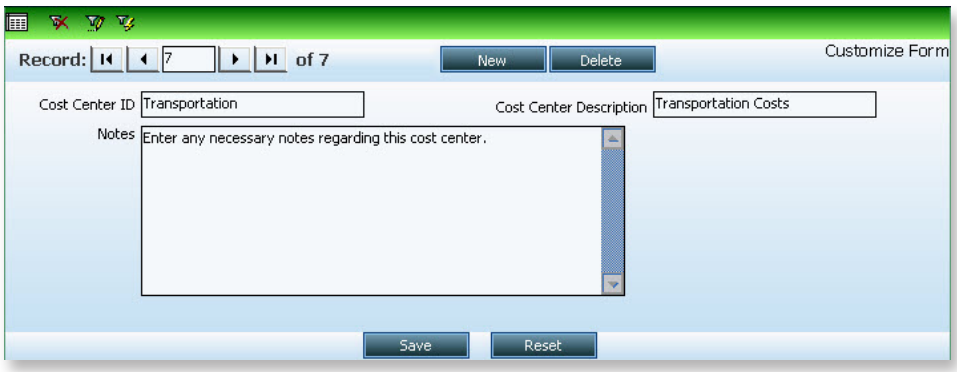
In this tab, assign users to a group, one by one. Use the **User Name** pop-up list to select a user. Click the selected user on the list and close the window. Click the **Save** button. Saving the information creates a blank **User Name** field to add another user.

To delete a user from the list, check the associated **Delete** checkbox and click the **Delete** button.

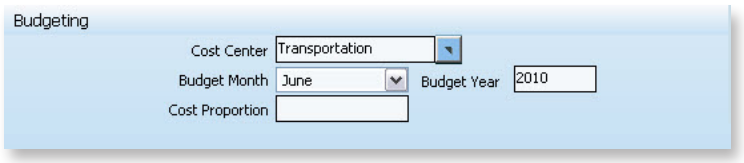


Cost Center Entry

In this form, enter a name, description and any applicable notes for each cost center, such as an office, warehouse, scheduled maintenance, unscheduled maintenance, transportation, etc.



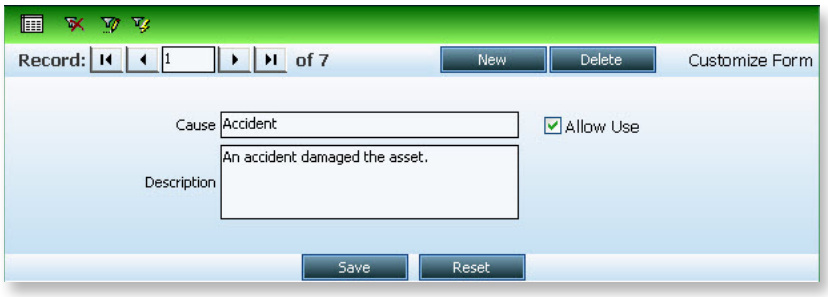
Cost center information is associated with budgets, PMs and work orders. To see an example, navigate to the **Work Orders -> Work Order Manager -> Information** tab and scroll down to the **Budgeting** pane:



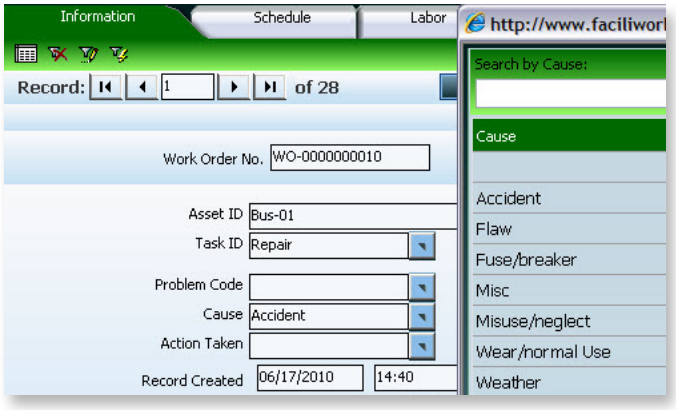
For more information about setting up cost center budgets, please see the **User Guide.**

Work Order Cause Entry

In FaciliWorks, you can track your work orders and service requests by cause. To define causes, navigate to **Configuration -> Work Order Cause Entry.** In this screen, you can name and describe causes and allow or disallow their use.



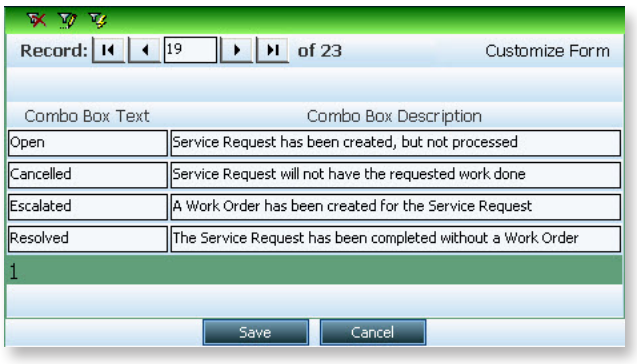
Checking the **Allow Use** checkbox makes the cause available in **Cause** pop-up lists in work orders and service requests:



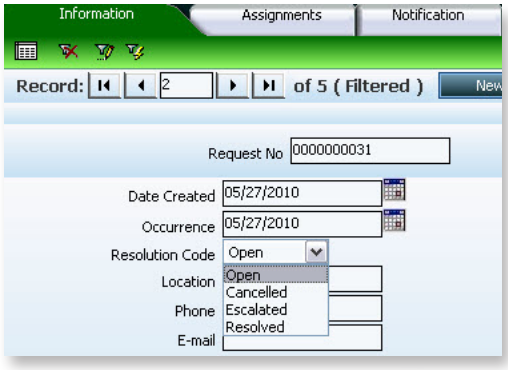
Leaving the **Allow Use** checkbox unchecked removes the **Cause** from the list of available **Causes** seen by users, but does not delete the **Cause** record from your database. This means that the **Cause** can still be used for report filtering and it can always be reactivated later.

Combo Box Entry

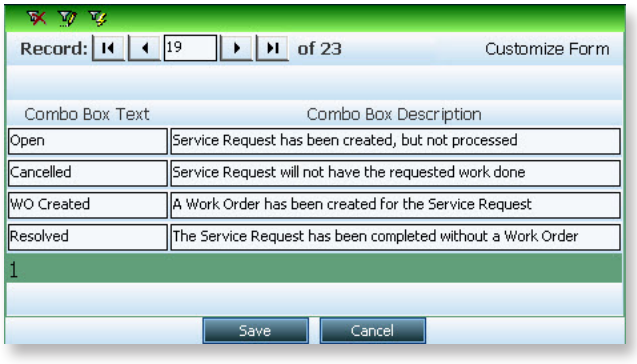
Navigate to **Configuration -> Combo Box Entry** to edit the names of the options that appear in drop-down lists throughout FaciliWorks.

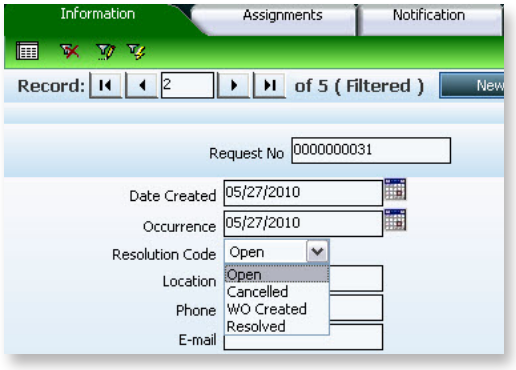


In the **Combo Box Text** fields are the names of the options that appear in the drop-down list (see **Resolution Code** drop-down in the service request image below). These names can be edited.



For example, in the various steps of a service request from creation to becoming a work order to completion, FaciliWorks automatically updates the contents of the **Resolution Code** field. The words in this drop-down list can be changed to better suit your needs, i.e., you can change the **Combo Box Text** from **Escalated to WO Created.**





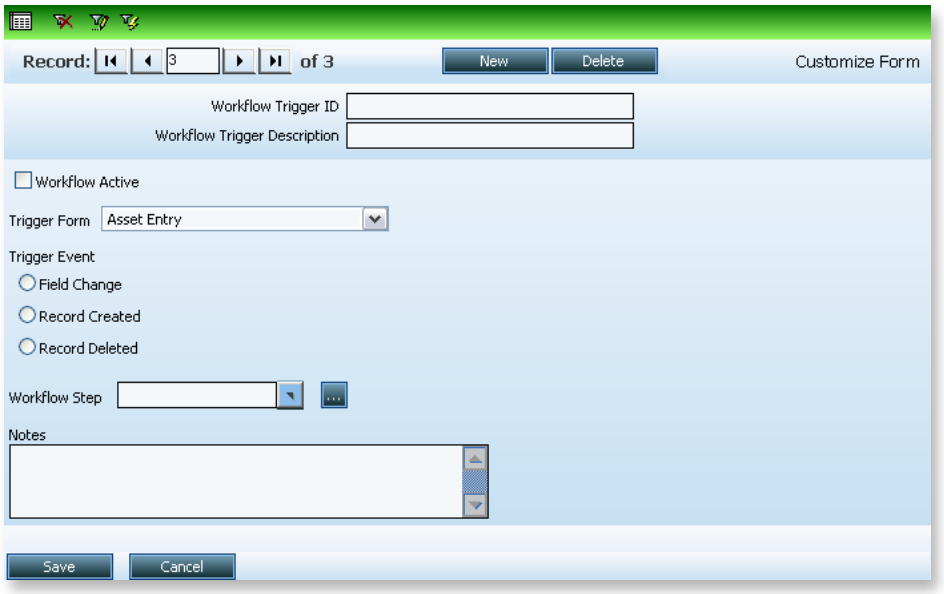
The **Combo Box Description** fields cannot be changed because these fields describe the FaciliWorks functionality. The resolution code that you're now calling **WO Created** will still be used when a work order is created for a service request. Regardless of the name, the underlying functionality does not change.

Workflow

In FaciliWorks 8i Calibration, you can create a series of steps to be followed when a specific event occurs. The **Workflow** process includes a trigger setup and a step setup.

Workflow Trigger Setup

The trigger setup is the first step in creating a workflow process. The events that can cause a process to be triggered include a field change, the creation of a record or the deletion of a record. When the event occurs, this will trigger an action (or series of actions) to be performed as specified within the trigger setup.



Workflow Trigger ID: Enter a unique name for your trigger.

Workflow Trigger Description: Enter a brief description of your trigger.

Workflow Active: Check this box to activate your trigger.

Trigger Form: Select a form from the drop-down list from which to base the trigger. Forms on this list include: Asset Entry, Asset Task, Basic PM, Basic WO, Maintenance Job, Multitask PM, Multitask WO, Part Master, Purchase Request/Order, Route PM and Service Request.

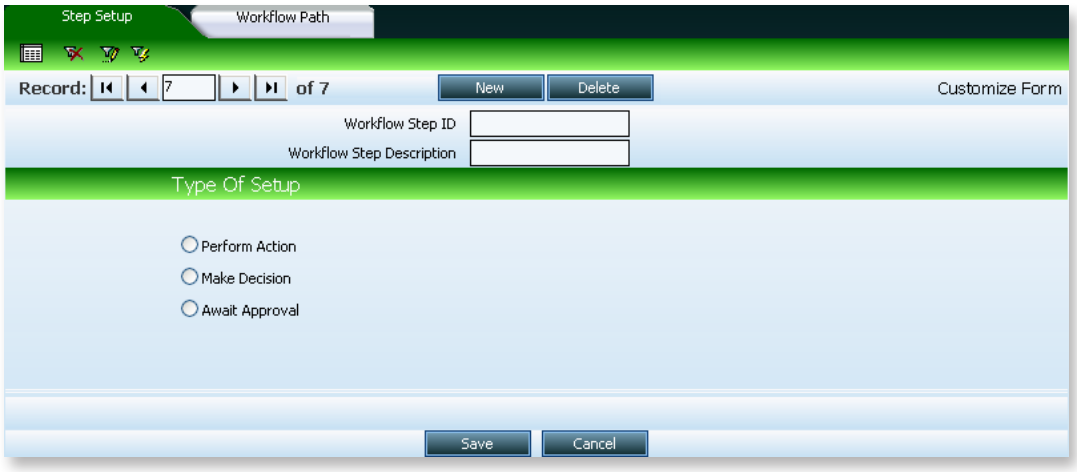
Trigger Event: Select from 3 possible events to trigger a process. Events include Field Change, Record Created or Record Deleted. Each of these events refer to the form specified in the Trigger Form field.

Workflow Step: When an event is triggered, the software will perform this step. The specifics of this step are defined in the Workflow Step Setup module. All workflow steps, once defined, will appear in the pop-up list. Clicking the ... button will display the specifics of the step.

Notes: Enter any pertinent information as required.

Workflow Step Setup

The step setup enables the user to define the specifics of the action to be taken when an event is triggered. Use the **Step Setup** tab to identify the details of the step. Once the entire process is created, it can be displayed using the **Workflow Path** tab.



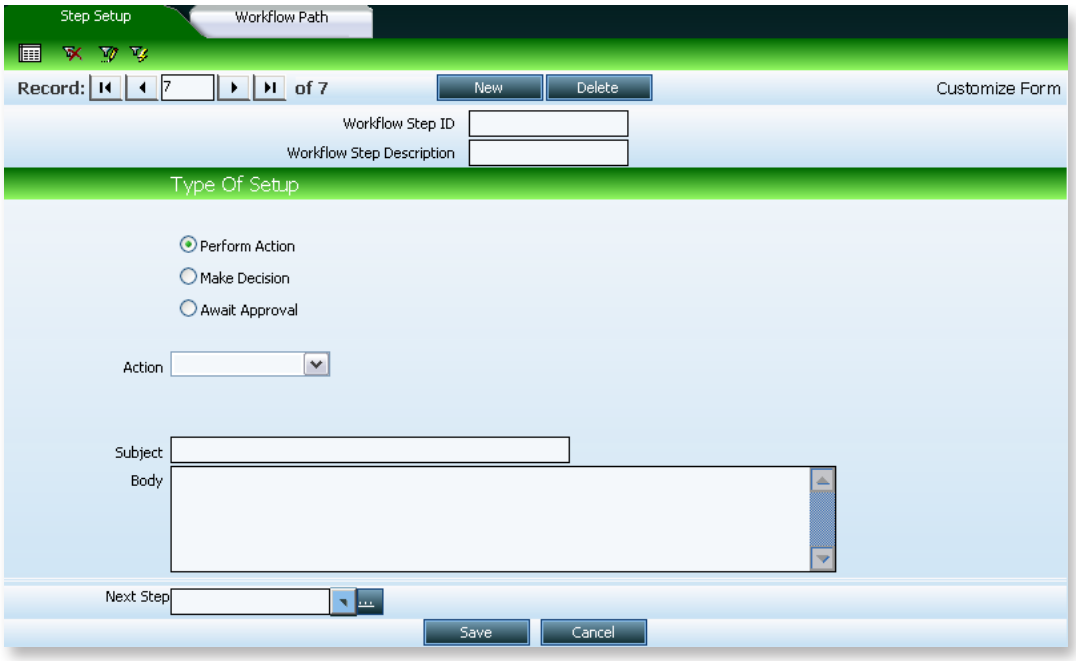
Workflow Step ID: Enter a unique name for your step.

Workflow Step Description: Enter a brief description of your step.

Type of Setup: Select from three types of actions to perform: Perform Action, Make Decision or Await Approval.

Perform Action

With this option, the user may select from two options; send email or send SMS (Short Message Service) message. SMS allows for short text messages to be sent from one cell phone to another.



Action: Use the Action pull-down to select the action to be performed: Send Email or Send SMS Message.

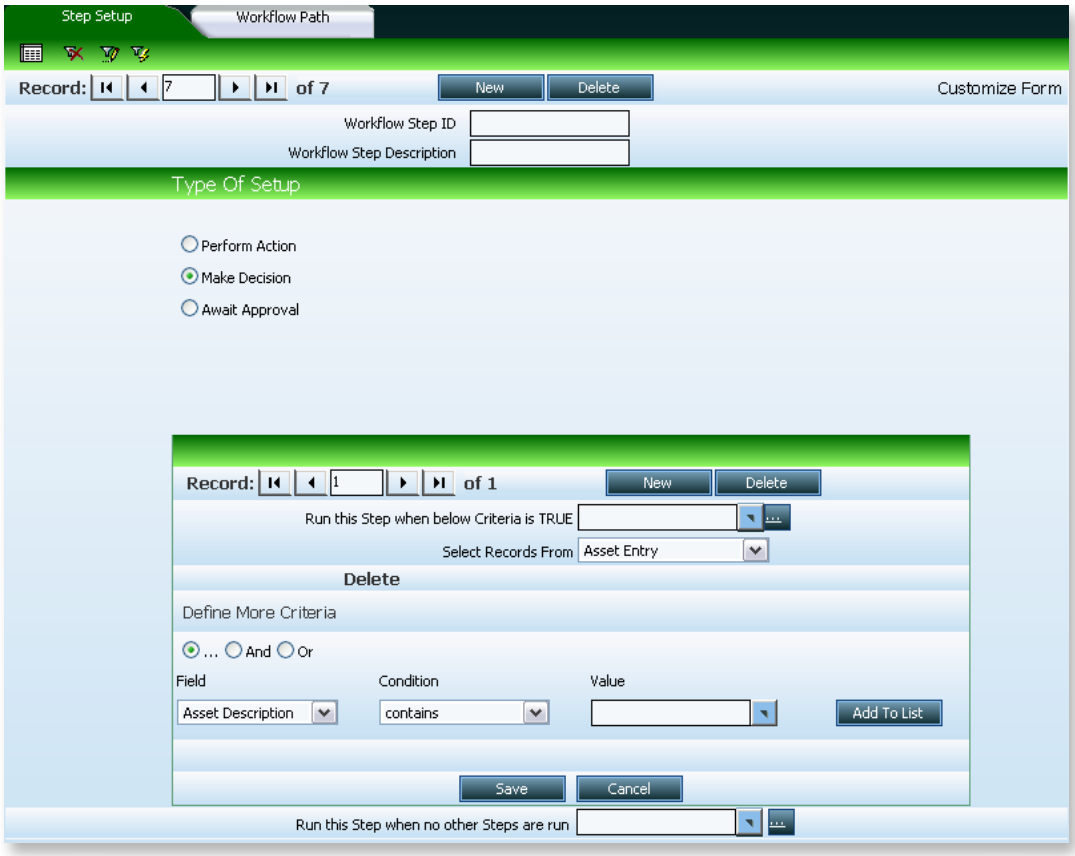
Subject: Enter the text for the subject line of the email.

Body: Enter the message of the email.

Next Step: Use the pop-up to select the name of the step to be performed next. After selecting the step, click the ... button to view the specifics of the next step.

Make Decision

The decision action requires the user to set up criteria much the same way that the advanced filter is used in other forms; if the criteria are true, another step is performed. The user can also specify a step to be performed if no other steps are executed.



Run this Step when below Criteria is true: Use the pop-up to select the name of the step to be performed. After selecting the step, click the ... button to view the specifics of the step.

Select Records From: Use the pull-down to select the location of the data from which to create the criteria; Asset Entry, Asset Task, Maintenance Job, Part Master, Purchase Request/Order, Service Request or Staff.

Define More Criteria: Select **And** or **Or** for multiple criteria.

Field: Select the field to create your criteria. The contents of the **Field** pull-down list depend on the selection made in the **Select Records From** pull-down.

Condition: Select the condition from the pull-down list.

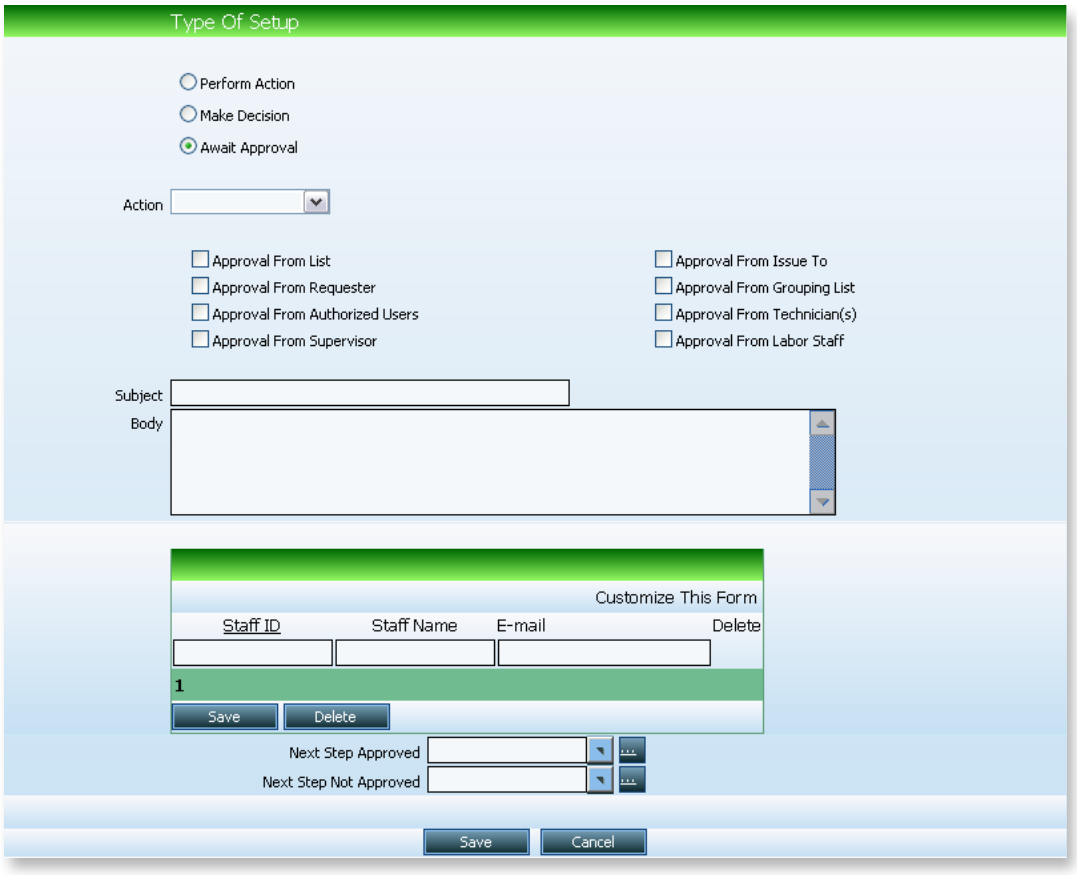
Value: Select the value from the pull-down list or type the value into the field.

Add to List: After specifying a criterion, click this button to add it to the list of criteria.

Run this Step when no other Steps are run: Select a step from the pop-up list if you need to run an alternate step when no other steps are triggered.

Await Approval

When you select to await an approval, you need to check the checkbox that will specify the type of approval you are awaiting. You then must decide on your courses of action for approval and non-approval.



Action: Use the Action pull-down to select the action to be performed; Send Email or Send SMS Message.

Approval From: Check the appropriate checkbox to specify the type of approval you are awaiting.

Subject: Enter the text for the subject line of the email.

Body: Enter the message of the email.

Staff ID: When the Approval From List checkbox is checked, the Staff ID pop-up will activate for you to select a staff member from the list. The Staff Name and email address of the selected staff member will auto-fill.

Next Step Approved: Use the pop-up list to select the name of the step to be performed if the step is approved. After selecting the step, click the button to view the specifics of the next step.

Next Step Not Approved: Use the pop-up to select the name of the step to be performed if the step is not approved. After selecting the step, click the button to view the specifics of the next step.

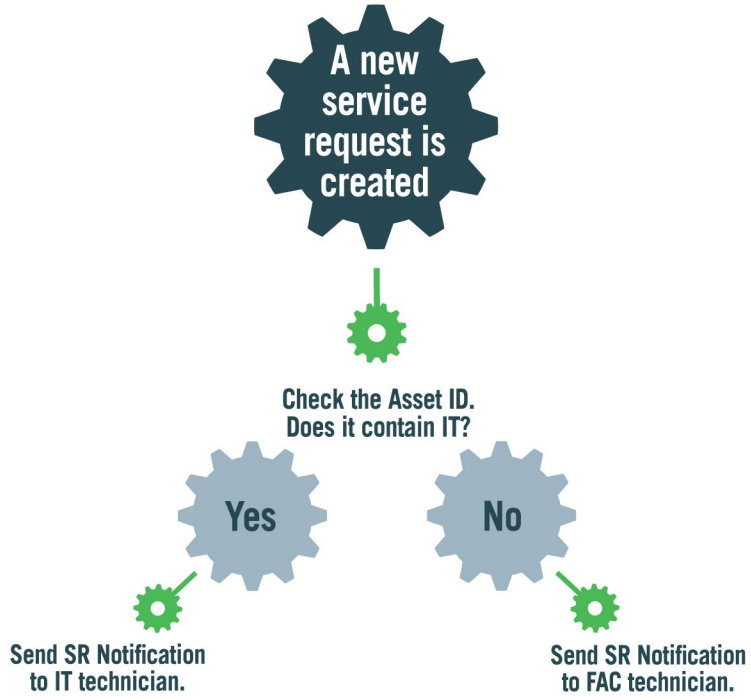
Workflow Example

The following example will show the creation of a workflow trigger and step setup for routing email messages when a new service request is created. It is recommended that you create your workflow on paper first to grasp a thorough understanding of the process.

Suppose that there are service requests created for two types of assets. The asset types are indicated in the **Asset ID** of the record; an ID containing IT is of the type IT while an ID containing FAC is of the type FAC.

When an asset requires maintenance created from a service request, an email is to be sent to the technician assigned to those asset types; IT assets are sent to the IT technician, facility asset types are sent to the FAC technician. A workflow process will be created to accommodate this task.

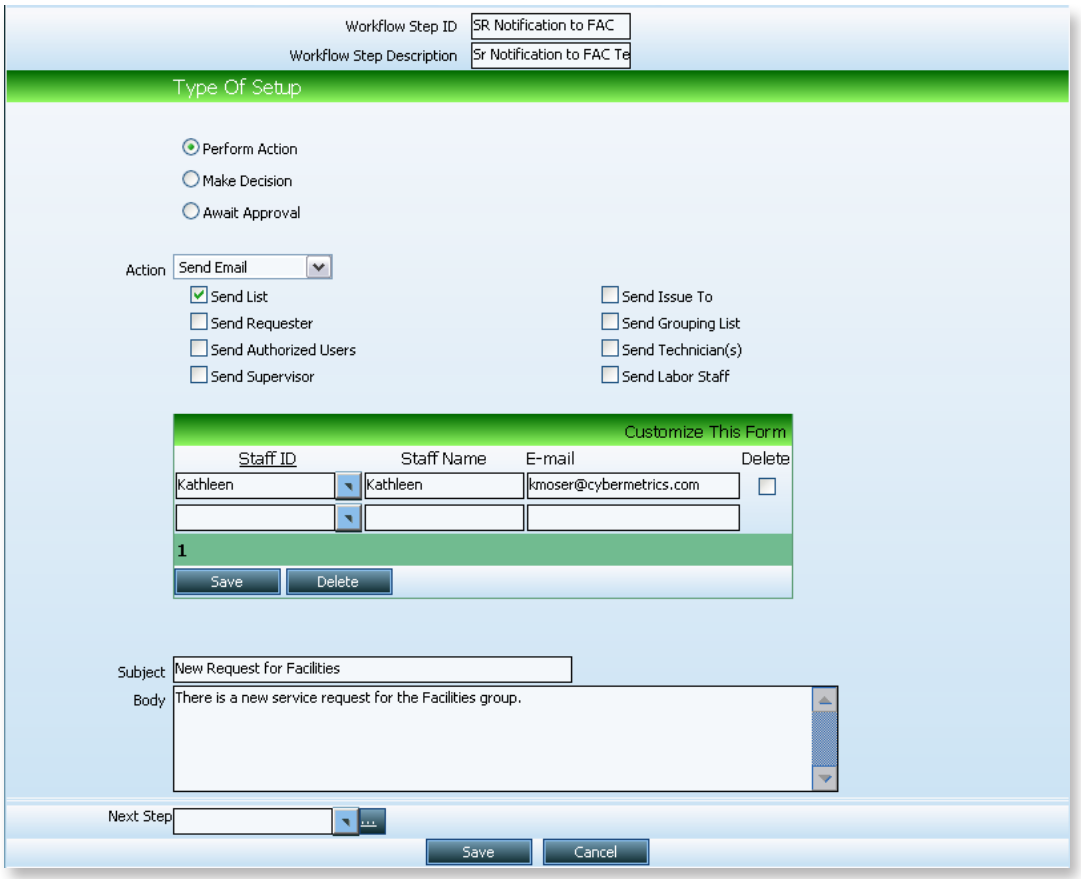
First, create the workflow on paper. The following flowchart illustrates the situation. When a new service request is created, the **Asset ID** field is checked to determine if it contains the letters IT. If it does, send an email to the IT technician. If it does not, send an email to the FAC technician.


A new service request is created
Check the Asset ID. Does it contain IT?
Yes
No
Send SR Notification to IT technician.
Send SR Notification to FAC technician.

To create the workflow, we will begin by creating the last step and work our way backward. The reason we do this will become apparent shortly.

Create Step to Perform Action 1

First, create the step to send an email to the FAC technician. Navigate to **Configuration -> Workflow Step Setup.** Enter a **Workflow Step ID** and **Workflow Step Description.**



Click the **Perform Action** radio button. Use the **Action** drop-down list to select **Send Email** and then check the **Send List** checkbox. Thus far, we have specified to send an email to a recipient list. The list is created using the **Staff ID** pop-up list. Use the pop-up to select the technician who will receive the email for the FAC assets.

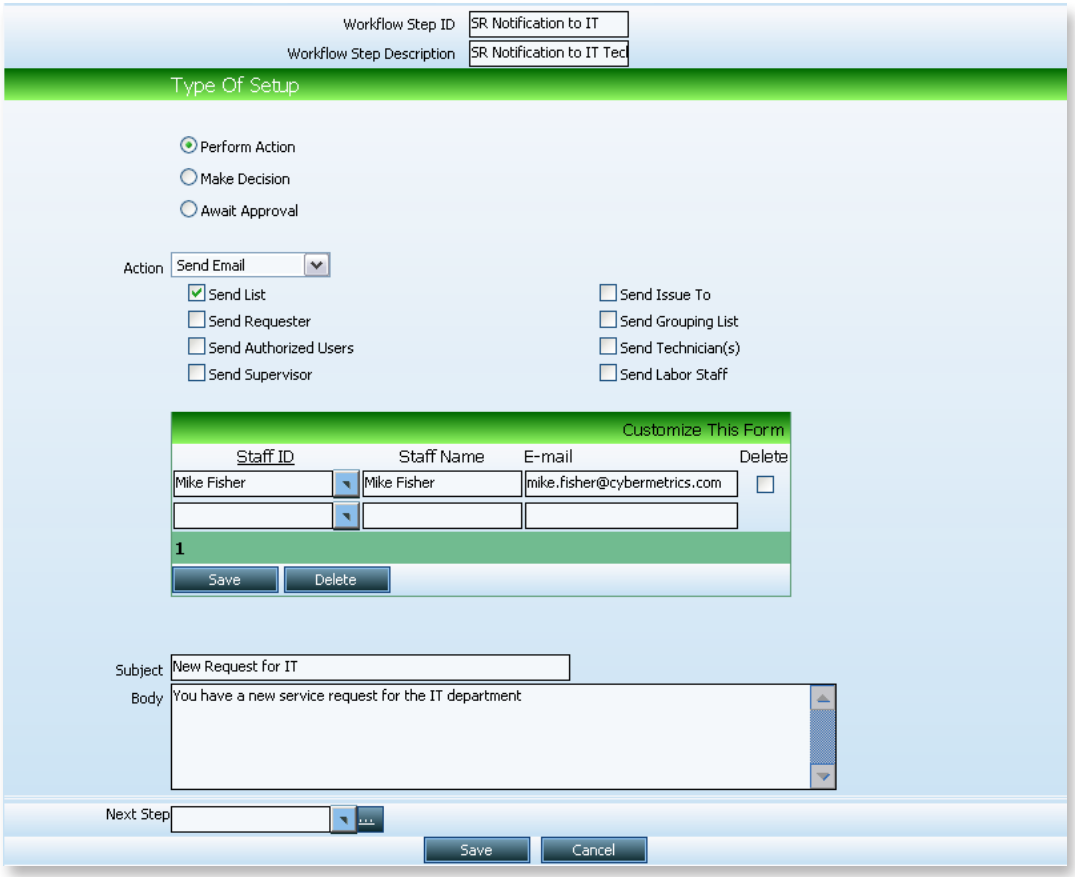
Save the record.

Notice as you save the record, FaciliWorks makes another record available for you. Continue to add staff as needed and save each record.

Complete the **Subject** and **Body** fields. When you are finished, click the **Save** button at the bottom of the form.

Create Step to Perform Action 2

Next, create the step to send an email to the IT technician. Click the **New** button at the top of the form to create a new step. Enter a **Workflow Step ID** and **Workflow Step Description.**



Click the **Perform Action** radio button. Use the **Action** drop-down list to select **Send Email** and then check the **Send List** checkbox. Thus far, we have decided to send an email to a recipient list. The list is created using the **Staff ID** pop-up list. Use the pop-up to select the technician who will receive the email for the IT assets.

Save the record.

Notice as you save the record, FaciliWorks makes another record available for you. Continue to add staff as needed and save each record.

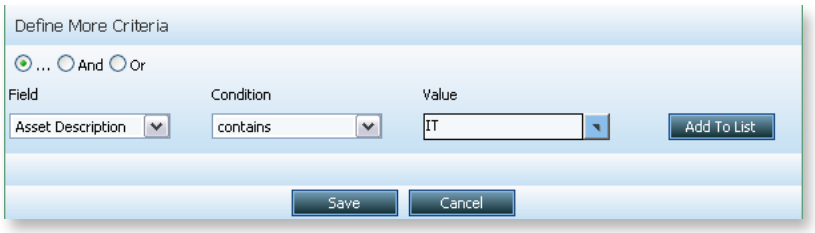
Complete the **Subject** and **Body** fields. When you are finished, click the **Save** button at the bottom of the form.

Create Step to Make Decision

The next step going backward in our flowchart is to determine whether or not the **Asset ID** field contains the letters IT.

Click the **New** button at the top of the form to create a new step. Enter a **Workflow Step ID** and **Workflow Step Description.**

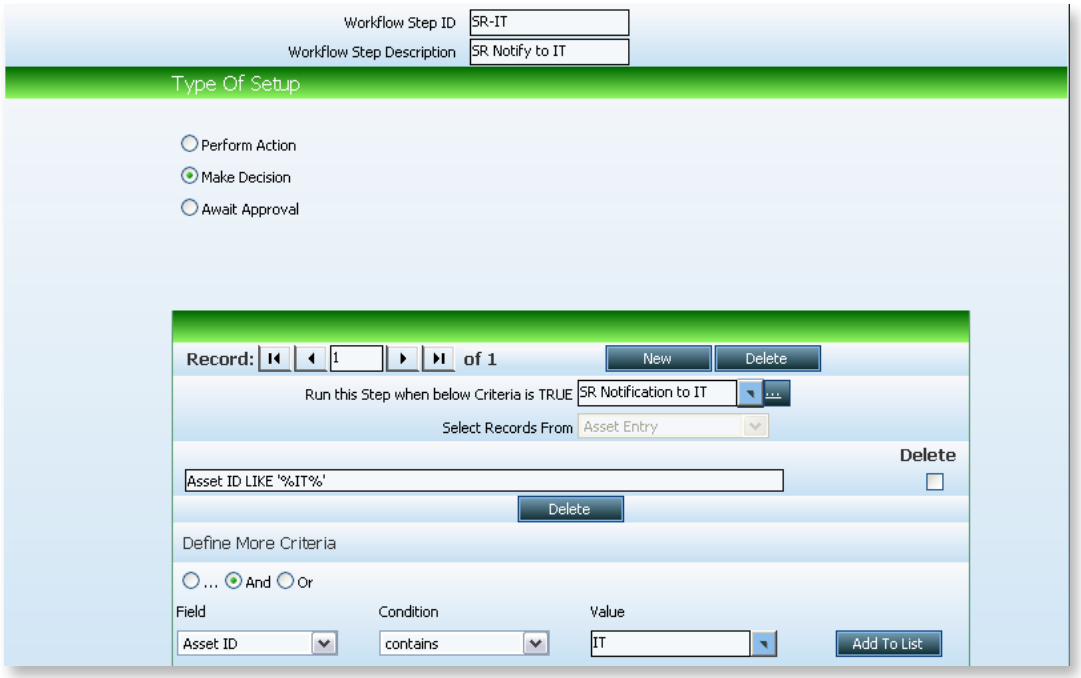
Click the **Make Decision** radio button. The form changes to allow you to set up a decision. In the **Define More Criteria** section, use the **Field** drop-down to select **Asset ID** and the **Condition** drop-down to select Contains. Type IT in the **Value** textbox. Click the **Add to List** button.



The criterion is added to the list displayed above the **Define More Criteria** section.

Create Step to Perform Action after Decision is Made

Next, identify the action to be performed if this statement is true. Use the **Run this Step when below Criteria is TRUE** pop-up to select the SR Notification to IT step. Because we already created the step to email the IT technician, it is now available in the pop-up list. It is for this reason that the steps are created in reverse.



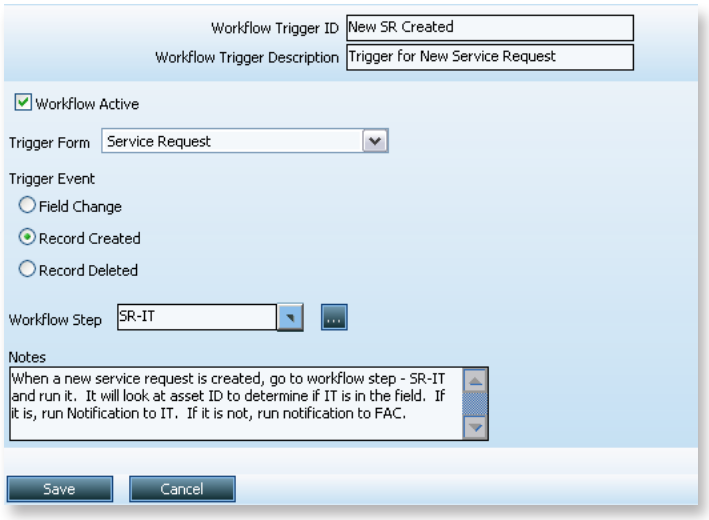
Finally, use the **Run this Step when no other Steps are run** pop-up to select the **SR Notification to FAC** step.

Click the **Save** button at the bottom of the form.

We have defined this step to check whether the **Asset ID** field contains the letters IT. If it does, perform the step to notify the IT technician. If it does not, perform the step to notify the FAC technician.

Create Trigger

Now that all steps are configured for this workflow, we can set up the trigger. Navigate to **Configuration -> Workflow Trigger Setup.** Give the trigger a name and description.


Workflow Trigger ID
New SR Created
Workflow Trigger Description
Trigger for New Service Request
Workflow Active
Trigger Form
Service Request
Trigger Event
Field Change
Record Created
Record Deleted
Workflow Step
SR-IT
Notes
When a new service request is created, go to workflow step - SR-IT and run it. It will look at asset ID to determine if IT is in the field. If it is, run Notification to IT. If it is not, run notification to FAC.
Save
Cancel

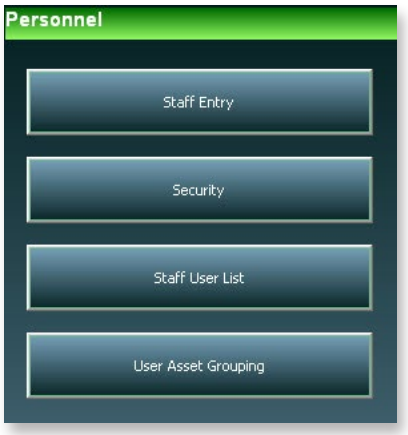
This trigger is based on the **Service Request** form when a record is created. The **Notes** field describes the action to take place; perform the step named SR-IT. This step has been created; use the **Workflow Step** pop-up to select it.

Check the **Workflow Active** checkbox to enable the trigger.

Save the form.

Chapter Five
Personnel

To enter staff records and create user security permissions, navigate to **Personnel** via the Main Menu.

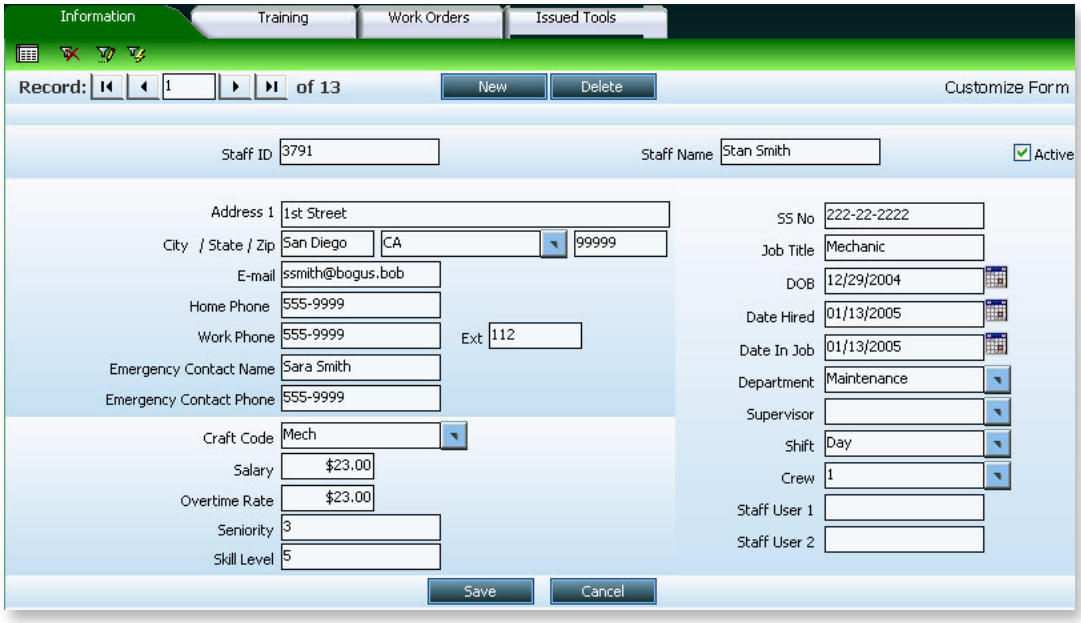


Staff Entry

Enter and view detailed employee records for your maintenance staff, including training information, assigned work orders and tools issued to each staff member.

Information Tab

Enter a unique alphanumeric identifier for each employee in the **Staff ID** field, the employee's full name in the **Staff Name** field and all other information in the remaining fields.



Check the **Active** checkbox to show that the employee is currently active. If the employee is not marked as active, his/her name will not appear on reports that list available employees, nor will it appear in pop-up lists for **Staff ID** fields on various data entry screens, such as the **Data Administration -> Assets -> Auth. Persons** tab.

IMPORTANT: It is important that you do not delete a staff record from the database. This action will create orphan records and therefore, all PMs and WOs associated with the deleted staff record will also be deleted. If the staff member is no longer a part of your organization, simply uncheck the Active checkbox.

Use the **Craft Code** field to categorize your workers by profession or trade. You can use a description, such as welder or electrical engineer or you can use a code, such as MIG-3 or a union number combined with a classification, such as 786-Journeyman or 786-Apprentice.

Fields such as C**raft Code** use pop-up lists. The contents of all pop-up lists within FaciliWorks are defined from within the **Configuration -> Admin Settings -> Advanced** tab and can be edited. Please see **Admin Settings** for detailed information.

Salary and **Overtime Rate** are used by FaciliWorks in the calculation of maintenance costs.

Enter the seniority or other work status of the employee in the **Seniority** field. For example, you could enter the number of years the employee has been in his field to determine seniority or you could use this field to store the date that determines seniority.

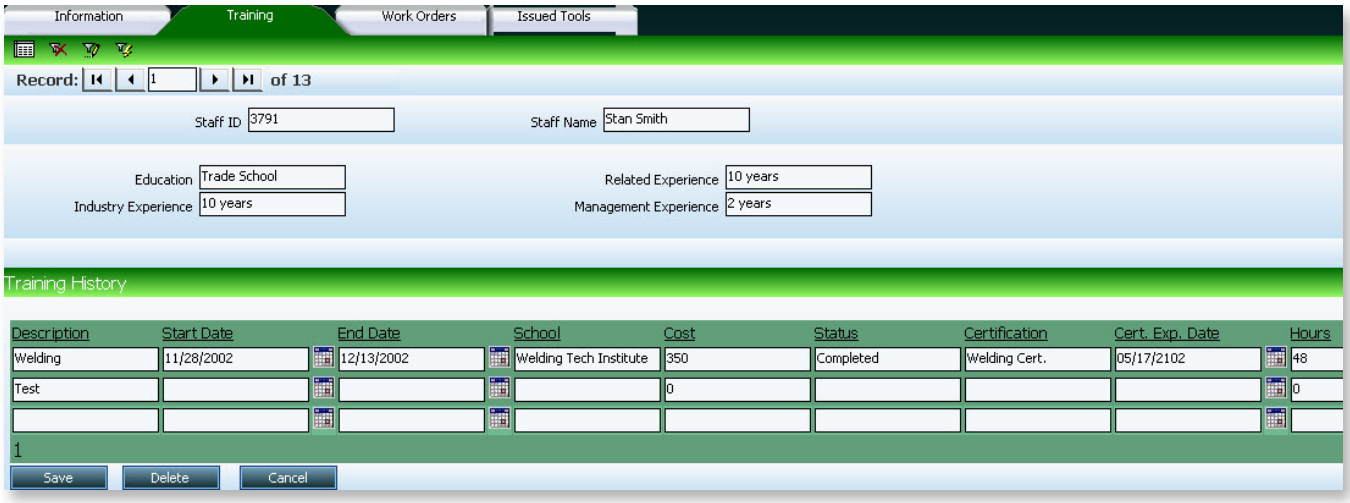
Using either an internal or external classification system, assign a **Skill Level** to each employee. You could also use this field to indicate multiple skills for your employees, assigning letters or numbers for different skills.

In the **Date Hired** and **Date in Job** fields, enter the date on which the employee was hired and the date on which the employee started his or her current position.

Staff User 1 and **Staff User 2** fields can be used to store any additional information. This type of field can be defined within the **Admin Settings -> Interface -> Custom Labels** tab. Please see **Admin Settings** for detailed information. You can also modify all form labels using the **Customize Form** button located at the top right corner of each form.

Training Tab

Use the **Staff Entry -> Training** tab to keep track of the employee's current and continuing education.



The **Staff ID** and **Staff Name** fields will be automatically populated from the data entered in the **Information** tab and are read-only on this form.

Education: Enter a brief description of the employee's education.

Industry Experience: Enter a description of the employee's industry experience here, such as "6 years Boiler Engineer, Class II."

Related Experience: Use this field to enter any other useful experience, such as "Four years of mechanical drafting - three-dimensional blueprints."

Management Experience: Enter any management experience that the employee has, such as "Supervised crew of 18 for installation of 3 cooling towers in 1996."

Training History

In this section, track classes and certifications that each employee has completed. Scroll to the right to see additional available fields.

Enter the basic details of the certification or training class; use the **Status** field to indicate whether or not the training is complete.

If the training was for a particular certification, enter the type of certificate in the **Certification** field; enter the certificate's expiration date, if applicable, in the **Cert. Exp. Date** field.

Hours: Enter the number of hours worth of training the employee has completed.

CEUs (Continuing Education Units): In this field, enter the number of credit units earned for the training.

Enter any other relevant information for this training or certification in the **Comments** field.

Work Orders Tab

This screen displays the work orders assigned to the staff member.

This information is not editable in this screen; it is automatically populated with information from work order records.

Click a column header to sort the list by that field.

Click the green box to the right of a field to view the work order record; the form displayed is the same form that can be accessed by navigating to the **Work Orders -> Work Order Manager -> Information** tab.

Issued Tools Tab

This screen lists the tools currently issued out to the staff member. This information is not editable in this screen; it is automatically populated with information from the issuance of tools. When a tool is returned, it no longer appears in this list (this is not an issuance history).

Click a column header to sort the list by that field.

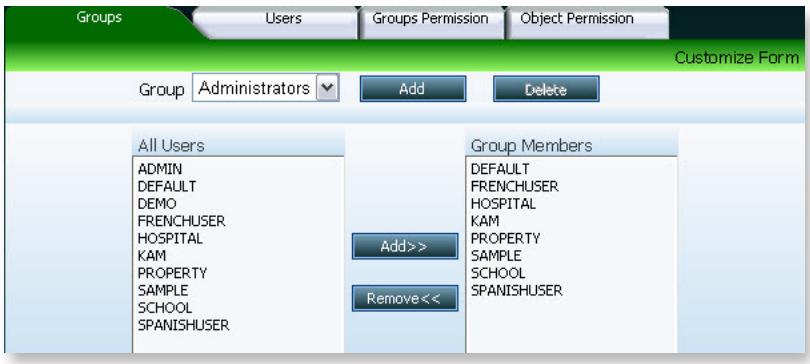
Security

FaciliWorks offers you several system security options, including group and object permissions. Assigning users to defined user groups saves time versus assigning individual permissions. Access the security feature by navigating to **Personnel -> Security.**

Groups Tab

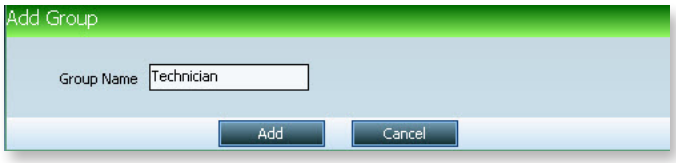
In this tab, create and edit names of security groups. The **Group** drop-down list will contain all groups you create. FaciliWorks 8i contains five configured groups for your convenience: **Administrator, Guests, Requests, Users** and **Work Orders.** In 8i Calibration, a **Calibrations** group is also included.

You can print out a listing of each group's permissions by navigating to **Reports -> Program Reports -> Group Permissions and Users.** As the report is quite lengthy, filter for each group before printing.



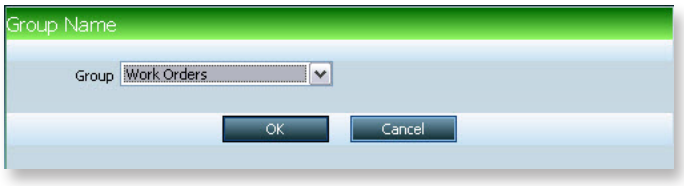
Add a Group – Copy Permissions and Users

To add a new group, click the **Add** button. The **Add Group** form will open in a separate window. Type a name for the new group in the **Group Name** field.

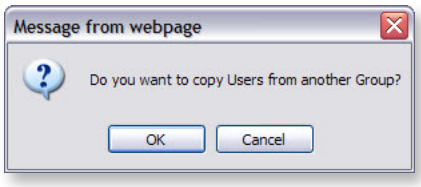


Click the **Add** button to create the new group and the following message will appear:

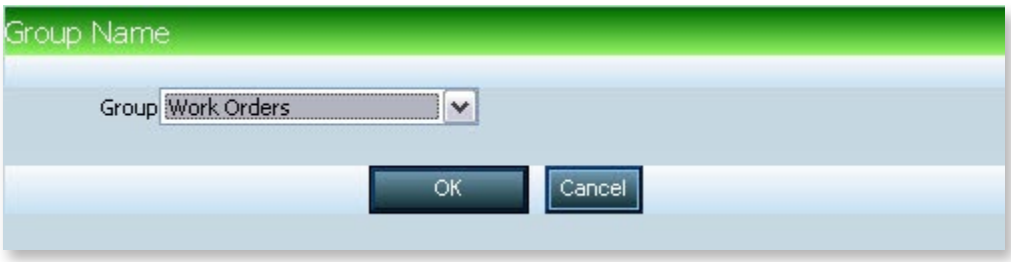
The program asks if you want to copy group permissions from another group. Click **OK** to copy the rights or click **Cancel** to assign unique permissions to this group (to save time, it is recommended that you copy permissions from another group). Clicking **OK** will open the following window:



From the **Group** drop-down list, select the name of the group whose permissions you would like to copy to the new group and click **OK.** The following window will open:



Click **OK** to copy the list of users from another group to the new group or click **Cancel** to specify a unique list of users. Clicking **OK** will open the following window:

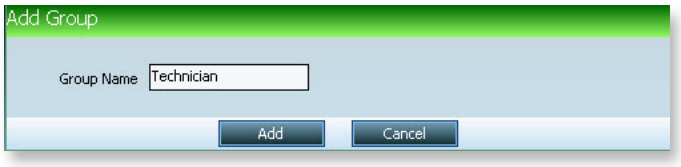


Use the **Group** drop-down list to select the group whose list of users you would like to copy to the new group. Click **OK.**

You are returned to the **Groups** tab. Use the **Group** drop-down list to select the new group and view a list of its members.

Add a Group – Select Unique Permissions and Users

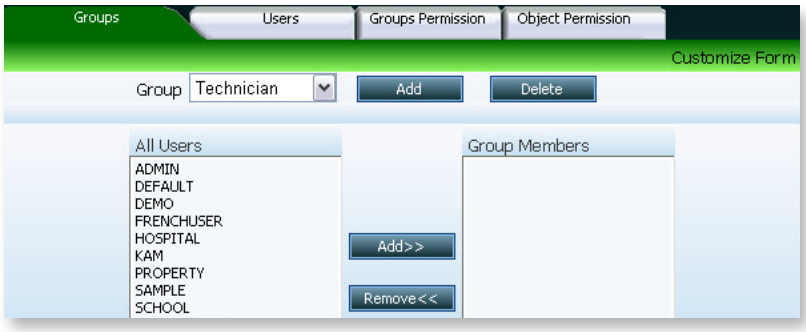
To add a new group, click the **Add** button. The **Add Group** form will open in a separate window. Type a name for the new group in the **Group Name** field.



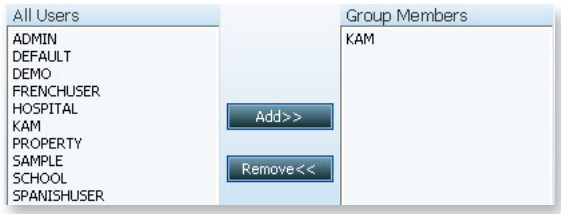
Click the **Add** button to create the new group and the following message will appear:

Click **Cancel** to assign unique permissions to this group.

You are returned to the **Groups** tab. Use the **Group** drop-down list to select the group you've just created.

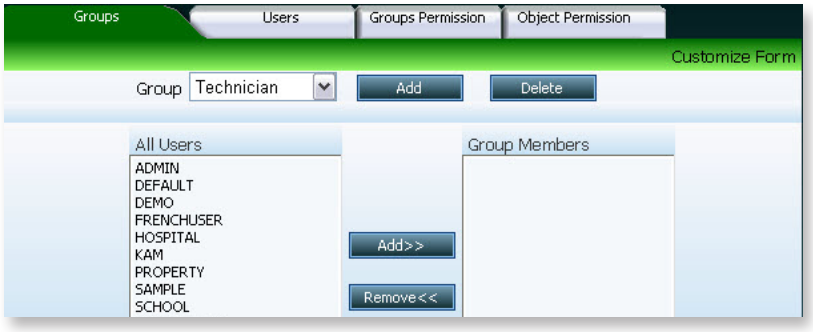


The **All Users** pane lists all current FaciliWorks users. To add users to the new group, click the user name and then click the **Add>>** button. The user is then shown in the **Group Members** list.

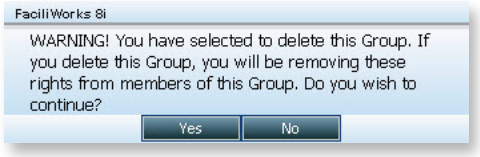


To remove a user from a group, select the user from the **Group Members** pane and then click the **Remove<<** button.

Delete a Group



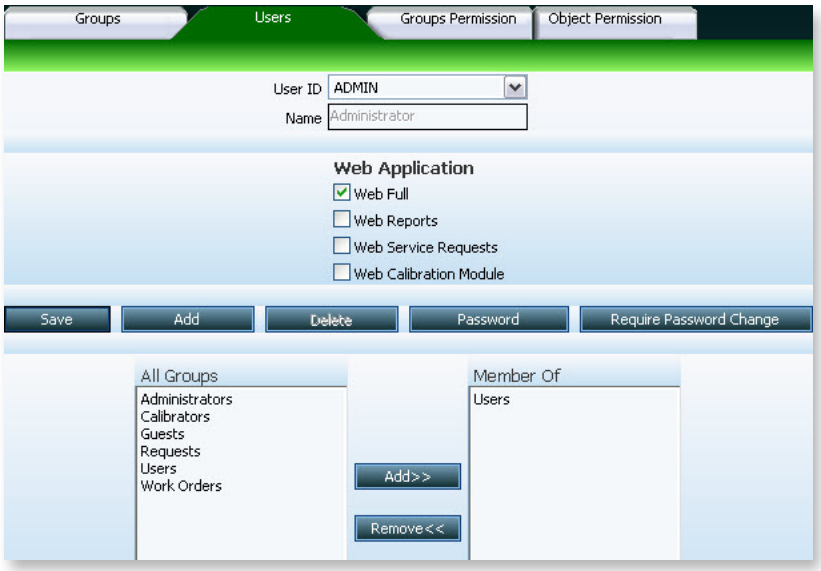
From the **Group** drop-down list, select the group you want to remove and then click the **Delete** button. The following confirmation message will open:


FaciliWorks 8i
WARNING! You have selected to delete this Group. If you delete this Group, you will be removing these rights from members of this Group. Do you wish to continue?
Yes
No

Click **Yes** to continue or **No** to cancel the deletion of the group.

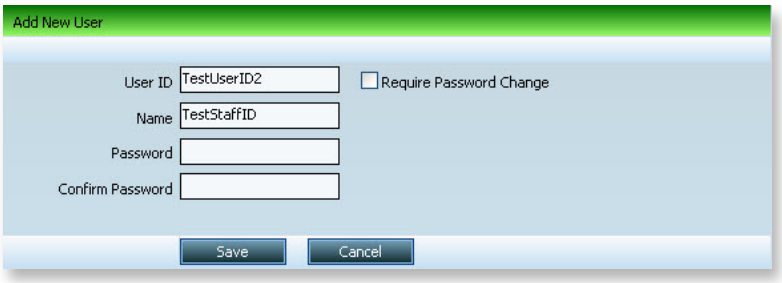
Users Tab

Navigate to the **Personnel -> Security -> Users** tab to create, edit and delete FaciliWorks user records and assign users to security groups.



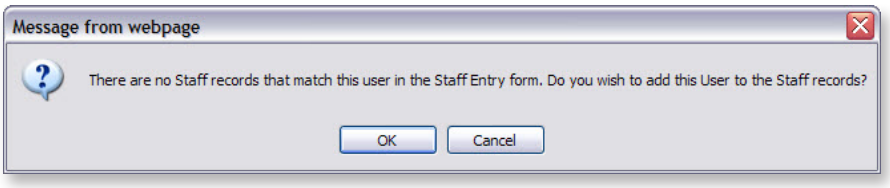
Create a New User

1. To create a new user, click the **Add** button. The **Add New User** form will open.
2. In the **User ID** field, enter a unique alphanumeric code. This will be the **User ID** used to log in to FaciliWorks. The **User ID** is not case-sensitive.
3. In the **Name** field, enter the user's **Staff ID.** (The **Staff ID** is entered within the **Personnel -> Staff Entry -> Information** tab.) If the new user does not have a staff record or if you prefer not to link the new user to a staff record, leave the **Name** field blank. The name of the user will be displayed at the bottom middle section of the FaciliWorks screen.



4. Type a password in both the **Password** and **Confirm Password** fields. (The password must comply with specifications defined within the **Configuration -> Admin Settings -> Security** tab.) The password is case-sensitive.
5. Click the **Require Password Change** checkbox if it is required that the user change his password when he logs in to FaciliWorks for the first time.
6. Click the **Save** button to save the new user record.

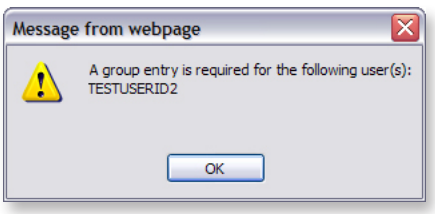
   If you did not enter a **Staff ID** for the new user, the following message will appear:


Message from webpage
There are no Staff records that match this user in the Staff Entry form. Do you wish to add this User to the Staff records?
OK
Cancel

   Clicking **OK** will open a staff entry form in another window. See **Staff Entry** for detailed information about entering staff records. Save the new staff record.

   If you prefer not to link the new user to a staff record, click **Cancel** instead.

7. The new user record has been created and the following message opens, reminding you to add the new user to a security group.



8. Click **OK** to return to the **Users** tab. (You can now proceed to add the user to a group or you can do it later, but you will continue to receive this message until that has been done.

9. On the **Users** tab, use the **User ID** pull-down menu to select the newly created user; the **Name** field will be automatically populated with the user's name.

10. Select the type of web application the user will be using: **Web Full** gives the user access to **Web Reports, Web Service Requests** and **Web Calibration Module** (Calibration Module is only available for 8i Calibration) or access to reports, service requests and calibration can be given separately by checking the corresponding checkbox. If the user is given **Web Full** rights, it is not necessary to check any other checkboxes.

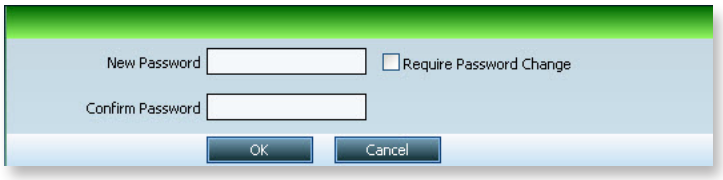
11. In the **All Groups** pane, highlight the group(s) to which this user should belong, then click the **Add>>** button. This assigns the user to the group(s) and the groups are then listed in the **Member Of** pane. You must assign each user to at least one group and it is recommended that each user be a member of only one group.

Note: The user receives the lowest level of privileges available in the groups to which he or she is assigned. For example, if the user is assigned to a group that cannot delete tool records, but is also assigned to a group that can delete tool records, the user will not have permission to delete tool records.

12. Click the **Save** button to save the new user record.

Change Password

To change a user's password, click the **Password** button and the following window will open:

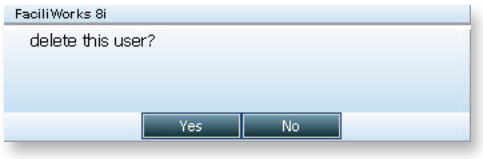


Enter a new password in both fields, click the **Require Password Change** checkbox (if necessary) and click **OK.**

Changing or Deleting a User ID

You cannot change a **User ID;** you can only delete the user and create a new one. Once a **User ID** has been used, it cannot be reused; FaciliWorks retires the ID. The reason for this is that **User IDs** are shown in **Audit Log** records.

To delete a user, use the **User ID** drop-down list to select the record and click the **Delete** button. The following confirmation message will appear:



Click **Yes** to delete or click **No** to cancel this action.

Groups Permission Tab

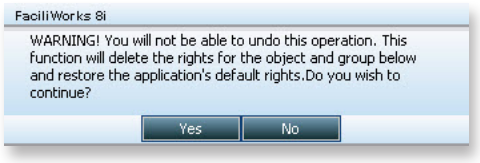
Use this form to create unique sets of rights for each group. If you need to assign unique rights to an individual user, create a unique group for that user, then go to this screen to assign the specific rights to the group.

Use the **Group** drop-down list to select the name of the group whose rights you want to edit.

In the **Select Object** pane, click one of the object radio buttons; upon selection of the object, the options for that object become available.

It is important to coordinate the permissions that you assign. For example, you can't allow a group to add new asset records, but then remove their access to the **Asset ID** field.

Click the **Default Permissions** button to restore the default rights for the group. The following confirmation message will appear:

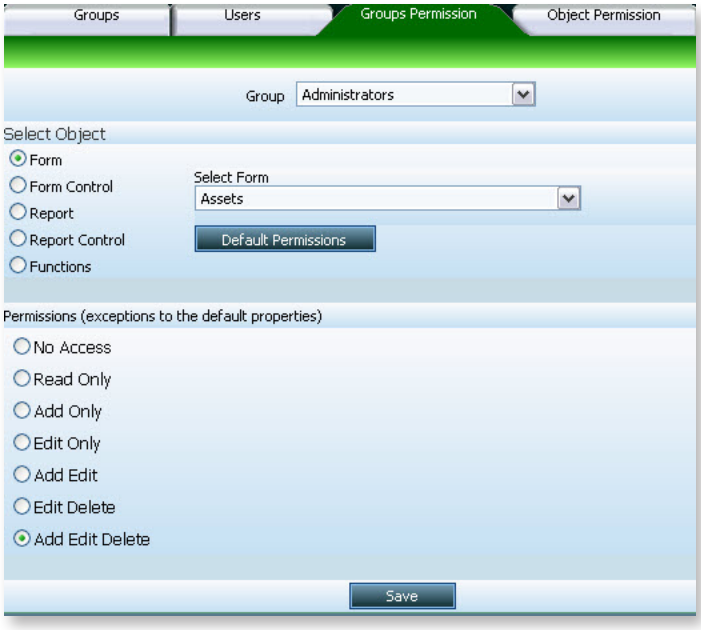

FaciliWorks 8i
WARNING! You will not be able to undo this operation. This function will delete the rights for the object and group below and restore the application's default rights.Do you wish to continue?
Yes
No

Click **Yes** to continue or **No** to cancel the action.

After specifying permissions, be sure to click the **Save** button.

Form Permissions

This object is used to set permissions for the entire form.



Form: Click this radio button to edit permissions to forms.

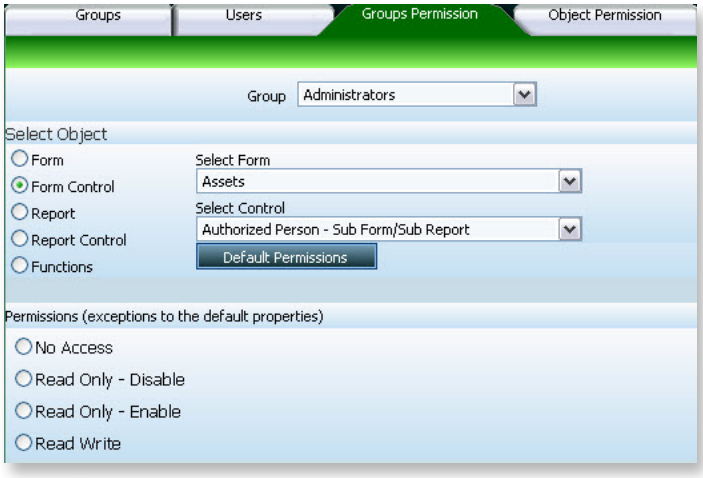
Select Form: This field appears when you select the **Form** radio button. Use the drop-down list to select each form to which you need to assign rights for this group. You can edit rights for only one form at a time.

Permissions: The options in this field will vary depending on which form is selected. Each permission type is listed below; not all of them appear for every selection. Click the radio button for the appropriate level of access for the group.

- **No Access:** Users cannot see, edit, add or delete records in this category.
- **Read Only:** Users can only view records.
- **Add Only:** Users can only add new records in this category.
- **Edit Only:** Users cannot add or delete records, but can edit them.
- **Add Edit:** Users can edit records and add new ones, but cannot delete them. It is highly recommended that general users not be given rights to delete records.
- **Edit Delete:** Users can edit or delete existing records, but not add new ones.
- **Add Edit Delete:** Users can edit, add and delete records.

Form Control Permissions

All fields, radio buttons, checkboxes, buttons, pull-down menus and pop-up menus on a form are called **Form Controls.**



Form Control: Click this radio button to assign rights to specific controls within record entry forms.

Select Form: This field appears when you select the **Form Control** radio button. Use the drop-down list to select each form to which you need to assign rights for this group. You can edit rights for only one form at a time.

Select Control: The available options in this field will vary depending on which form is selected in the **Select Form** drop-down list. Use the drop-down list to select each control to which you need to assign rights for this group. You can edit rights for only one control at a time.

Permissions: The options in this field will vary depending on which form is selected. Each permission type is listed below; not all types appear for every selection. Click the radio button for the appropriate level of access for the group.

- **No Access:** Users have no access to the control; although the control is visible, a security message will display if the control is clicked:

  Page cannot be displayed
This is not an error, either you have no access or the form does not exist. Please contact your administrator for assistance.

  To hide the control from the user group, be sure to activate this feature by navigating to **Configuration -> Admin Settings -> Security** and check the **Hide Buttons with No Rights** checkbox. (For example, you can block users from viewing salary-related fields in the **Staff Entry** form).

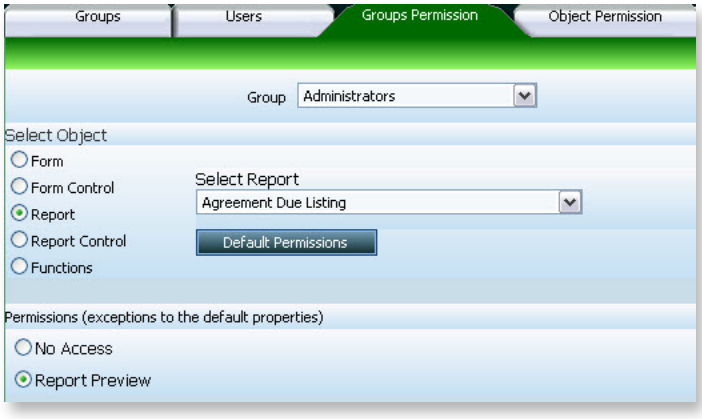
- **Visible - Disabled or Enabled:** Users see the button control, but cannot use it; the disabled feature grays out the control (**Disabled** and **Enabled** refer only to the button's appearance).

- **Read Only - Disabled or Enabled:** Users see the control, but cannot change its contents; the disabled feature grays out the control (**Disabled** and **Enabled** refer only to the button's appearance).

- **Read/Write:** Users can view and change the contents of the field.

Report Permissions

Use this radio button to set security permissions for an entire report.



Report: Click this radio button to define permissions for FaciliWorks reports.

Select Report: This field appears when you select the **Report** radio button. Use the drop-down list to select each report to which you need to assign rights for this group. You can edit rights for only one report at a time.

Permissions: Click the radio button for the appropriate level of access for the group.

- **No Access:** Users cannot view the report (it won't appear in the list of available reports on the Reports menu).
- **Report Preview:** Users can preview and print the report.

Report Control Permissions

All labels, data field placeholders and checkboxes are **Report Controls.**

Report Control: Click this radio button to edit rights to specific controls in reports.

Select Report: This field appears when you select the **Report Control** radio button. Use the drop-down list to select each report to which you need to assign rights for this group. You can edit rights for only one report at a time.

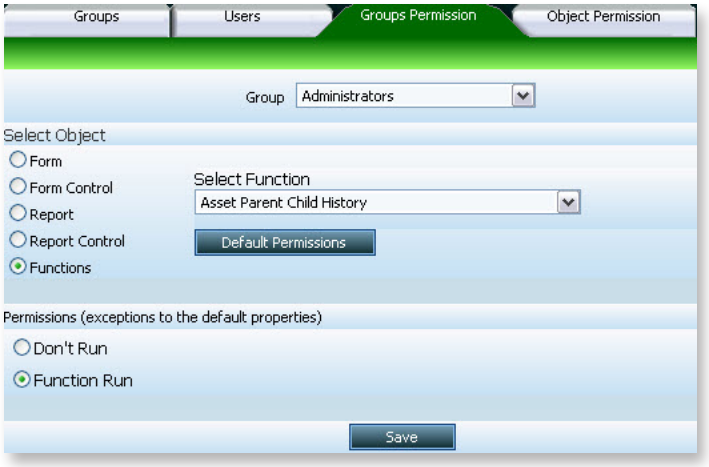
Select Control: The available options in this field will vary depending on which report is selected in the **Select Report** drop-down list. Use the drop-down list to select each control to which you need to assign rights for this group. You can edit rights for only one control at a time.

Permissions: Click the radio button for the appropriate level of access for the group.

- **No Access:** Users cannot view the report (it won't appear in the list of available reports on the Reports menu).
- **Preview:** Users can preview and print the report.

Functions Permissions

This gives the user group access to the features in the **Utilities** and **Data Tools** menus, which are called **Functions.**



Functions: Click this radio button to assign rights for FaciliWorks functions.

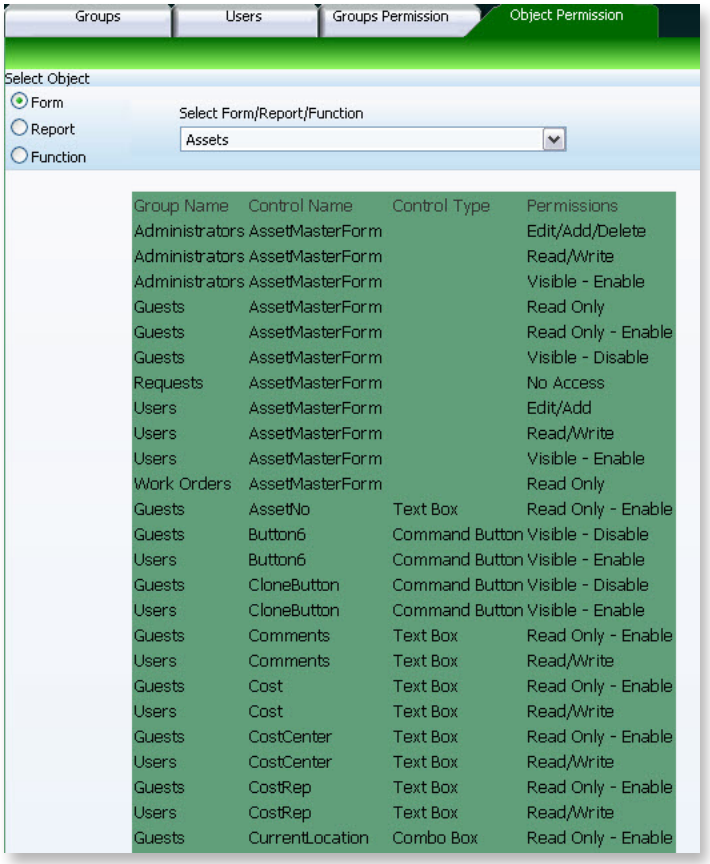
Select Function: This field appears when you select the **Functions** radio button. Use the drop-down list to select each function to which you need to assign rights for this group. You can edit rights for only one function at a time.

Permissions: Click the radio button for the appropriate level of access for the group.

- **Don't Run:** The function is not active.
- **Function Run:** The function is enabled for the user group.

Object Permission Tab

Use this screen to see a summary of the permissions that have been assigned for a particular form, report or function. Information in this tab is not editable here; it is an organized list of permissions assigned within the **Group Permissions** tab; i.e., it shows permissions sorted by object rather than by group.



Group Name	Control Name	Control Type	Permissions
Administrators	AssetMasterForm		Edit/Add/Delete
Administrators	AssetMasterForm		Read/Write
Administrators	AssetMasterForm		Visible - Enable
Guests	AssetMasterForm		Read Only
Guests	AssetMasterForm		Read Only - Enable
Guests	AssetMasterForm		Visible - Disable
Requests	AssetMasterForm		No Access
Users	AssetMasterForm		Edit/Add
Users	AssetMasterForm		Read/Write
Users	AssetMasterForm		Visible - Enable
Work Orders	AssetMasterForm		Read Only
Guests	AssetNo	Text Box	Read Only - Enable
Guests	Button6	Command Button	Visible - Disable
Users	Button6	Command Button	Visible - Enable
Guests	CloneButton	Command Button	Visible - Disable
Users	CloneButton	Command Button	Visible - Enable
Guests	Comments	Text Box	Read Only - Enable
Users	Comments	Text Box	Read/Write
Guests	Cost	Text Box	Read Only - Enable
Users	Cost	Text Box	Read/Write
Guests	CostCenter	Text Box	Read Only - Enable
Users	CostCenter	Text Box	Read/Write
Guests	CostRep	Text Box	Read Only - Enable
Users	CostRep	Text Box	Read/Write
Guests	CurrentLocation	Combo Box	Read Only - Enable

First, click one of the **Select Object** radio buttons. Then, use the **Select Form/Report/Function** drop-down list to select a specific object whose permissions you would like to see.

FaciliWorks will show you a listing of permissions for that object, including control permissions (fields/buttons) and group names.

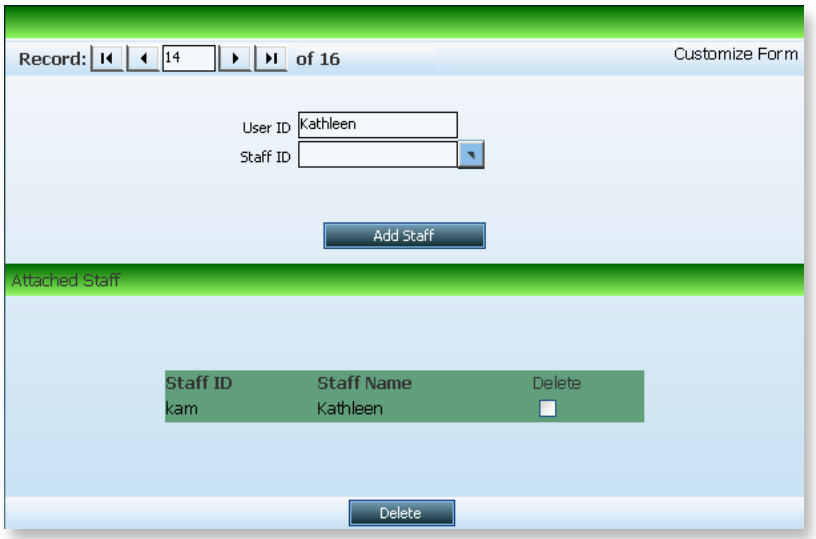
You can print out a listing of each group's permissions by navigating to **Reports -> Program Reports -> Group Permissions and Users.** As the report is quite lengthy, filter for each group before printing.

Staff User List

Sometimes when creating a FaciliWorks User ID for a staff member, you may neglect to link the ID to the staff record. To link the two records at a later time, use the **Staff User List** to attach the user's **User ID** to his or her **Staff ID.**

Navigate to **Personnel - > Staff User List.** Navigate to the user record that needs a staff link. Click the **Staff ID** pop-up and select the staff member to link to the user.

Selecting a staff record from the list and linking it to the user record will automatically add that staff member to the security records using their **Staff ID** as the **User ID.** The added staff member will then be able to log in to the application using the **User ID** and password when logging in for the first time. The linked staff record will be displayed in the **Attached Staff** section in the lower part of the window. Only one staff record can be assigned to a user record.



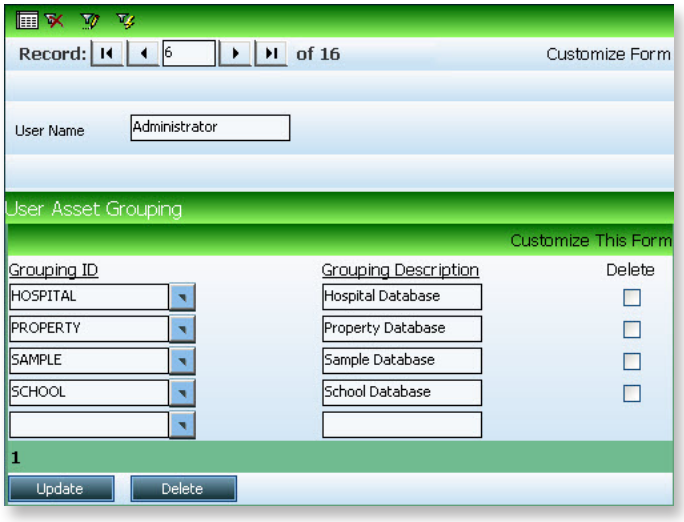
To delete the staff record link, check the **Delete** checkbox and then click the **Delete** button.

User Asset Grouping

The **User Asset Grouping** form contains the same information as the **Configuration -> Asset Grouping Entry -> User** tab, but the data is sorted by the user instead of being sorted by the group.

The **Asset Grouping Entry -> User** tab displays one **Asset Group** at a time with a list of users who have access to that group, whereas the **User Asset Grouping** form displays one **User Name** at a time with a list of **Asset Groups** to which that user has access.

This form contains one record for each user in the system. Use the record navigation bar to locate the record for the user. Use the **Grouping ID** pop-up list to select the group to which this user should have access; the **Grouping Description** field will be automatically populated.



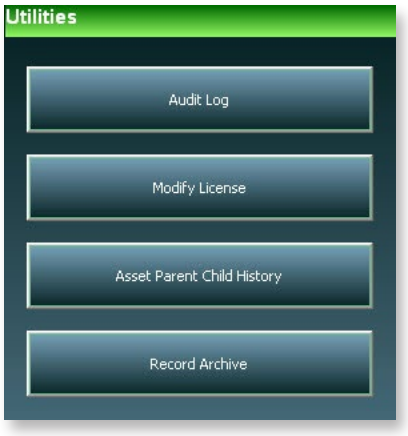
Click the **Update** button. This will save the record and will create another **Grouping ID** field to assign another group to the user.

Click **Update** after each group selection.

Chapter Six
Utilities

Utilities are functions that are used to maintain your FaciliWorks database. Viewing the audit log, modifying the concurrent user license and archiving records are some of the functions that can be performed from within this menu.

From the Main Menu, click **Utilities.**



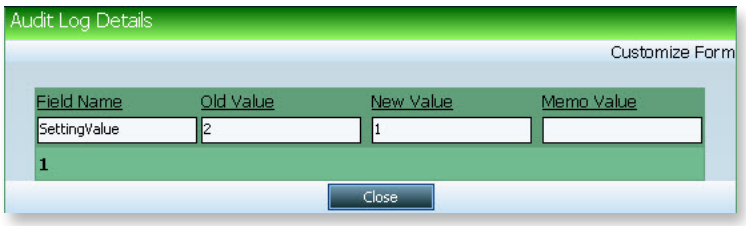
Audit Log

The **Audit Log** is a record of database usage such as record modifications and deletions, the name of the user who performed each action and the date and time of each action.

The **Audit Log** is a non-editable form. Records can be filtered using either the **Quick Filter** or **Advanced Filter.** Please see the FaciliWorks 8i User Guide for filter instructions.

Audit ID	Date / Time	User Name	Object	Action	Data Key	Details
6670	07/08/2010 17:22:57	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6669	07/08/2010 17:22:57	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6668	07/08/2010 17:16:57	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6667	07/08/2010 17:09:10	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6666	07/08/2010 17:09:09	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6665	07/08/2010 17:07:54	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6664	07/08/2010 17:07:53	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6663	07/08/2010 17:07:51	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6662	07/08/2010 17:07:48	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6661	07/08/2010 17:07:47	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 17:07:47	Details
6660	07/08/2010 16:36:01	Default User	SYSTEM_USER_SESSION_INFO	Delete	07/08/2010 16:03:41	Details
6659	07/08/2010 16:06:17	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 16:03:41	Details
6658	07/08/2010 16:06:16	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 16:03:41	Details
6657	07/08/2010 16:06:15	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 16:03:41	Details
6656	07/08/2010 16:05:38	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 16:03:41	Details
6655	07/08/2010 16:05:35	Default User	SYSTEM_USER_SESSION_INFO	Update	07/08/2010 16:03:41	Details

To view the old and new values of modified fields, click the **Details** button to the right of the associated audit record.



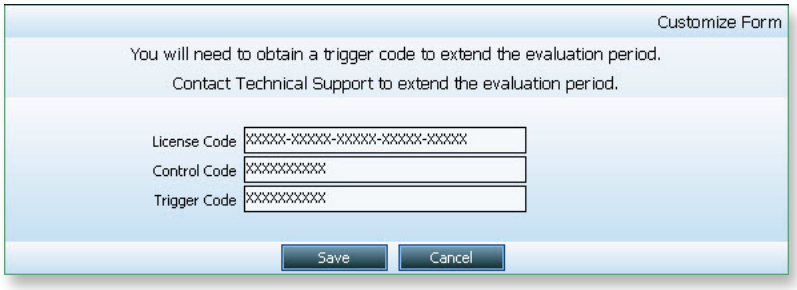
This function is enabled and configured from within the **Configuration -> Admin Settings -> Security** tab. Please see the **Audit Trail** section for more information.

Modify License

Use the **Modify License** screen to continue your license when your FaciliWorks 30-day evaluation period is about to expire or if you are upgrading from FaciliWorks 8i Professional to FaciliWorks 8i Enterprise.

Seven days before your evaluation period is over, FaciliWorks will display a message that this period is about to expire. (For your convenience, this period will not expire on a Saturday or a Sunday.)

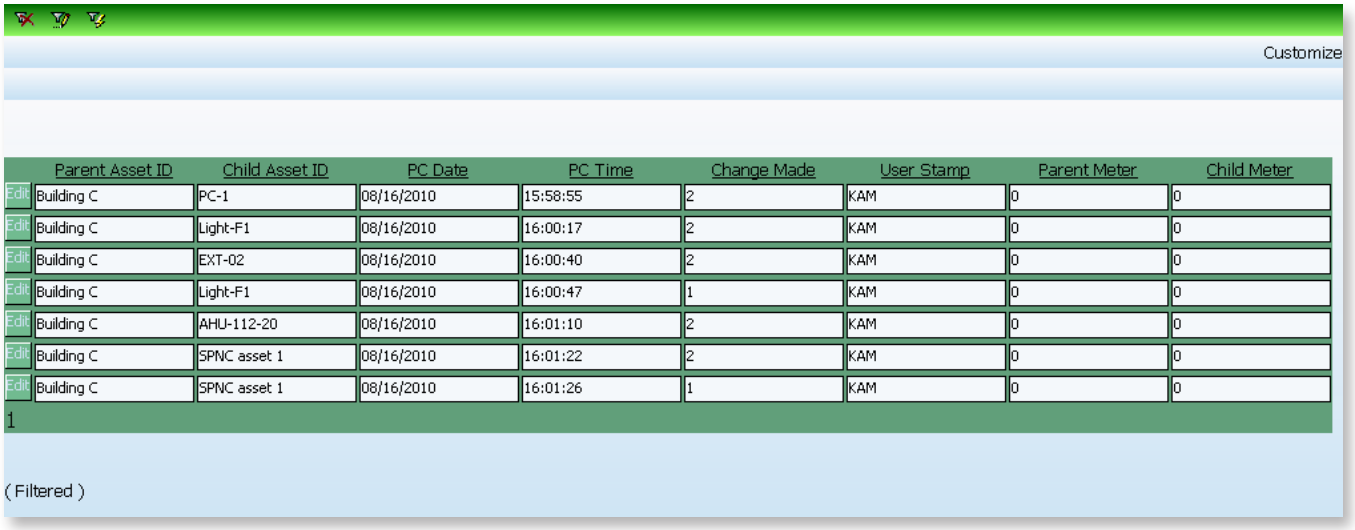
To continue your license, call CyberMetrics Technical Support at 1-800-776-3090 for instructions. You will be asked to provide your current license code and control code.



Click **Cancel** to return to the **Utilities** menu.

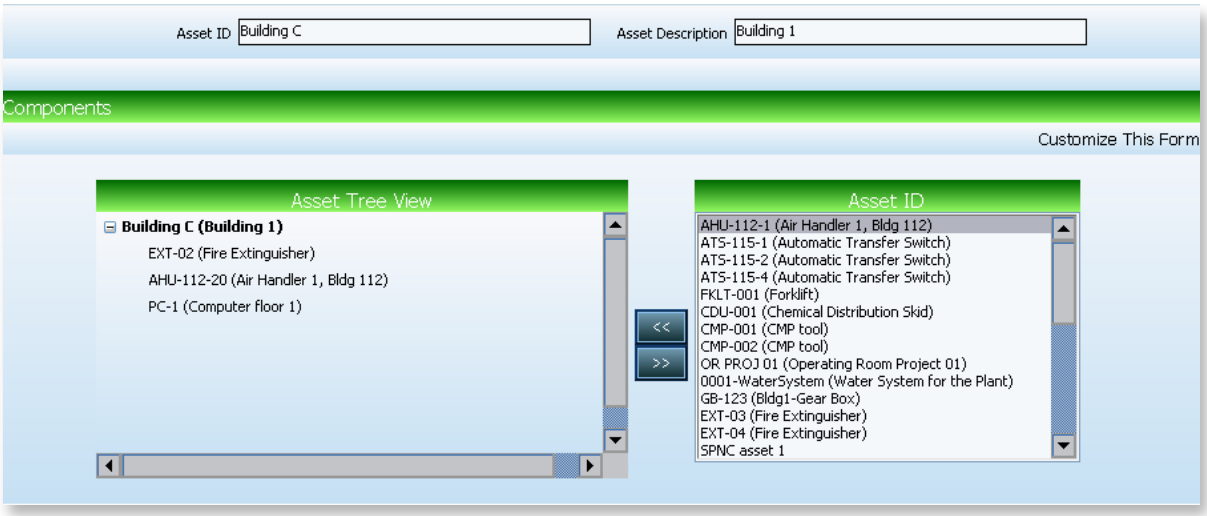
Asset Parent Child History

This utility displays a comprehensive history of the parent-child relationships of the assets in the database.


Customize
Parent Asset ID | Child Asset ID | PC Date | PC Time | Change Made | User Stamp | Parent Meter | Child Meter
Edit | Building C | PC-1 | 08/16/2010 | 15:58:55 | 2 | KAM | 0 | 0
Edit | Building C | Light-F1 | 08/16/2010 | 16:00:17 | 2 | KAM | 0 | 0
Edit | Building C | EXT-02 | 08/16/2010 | 16:00:40 | 2 | KAM | 0 | 0
Edit | Building C | Light-F1 | 08/16/2010 | 16:00:47 | 1 | KAM | 0 | 0
Edit | Building C | AHU-112-20 | 08/16/2010 | 16:01:10 | 2 | KAM | 0 | 0
Edit | Building C | SPNC asset 1 | 08/16/2010 | 16:01:22 | 2 | KAM | 0 | 0
Edit | Building C | SPNC asset 1 | 08/16/2010 | 16:01:26 | 1 | KAM | 0 | 0
1
(Filtered)

Each record lists the respective **Asset IDs** for both parent and child assets, the date and time a change was made to the child asset status, whether the child asset was added or removed (2 = added; 1 = removed) and the respective meter readings for both parent and child assets.

This history coincides with the **Asset Tree View** created on the **Components** tab of the **Assets** form.

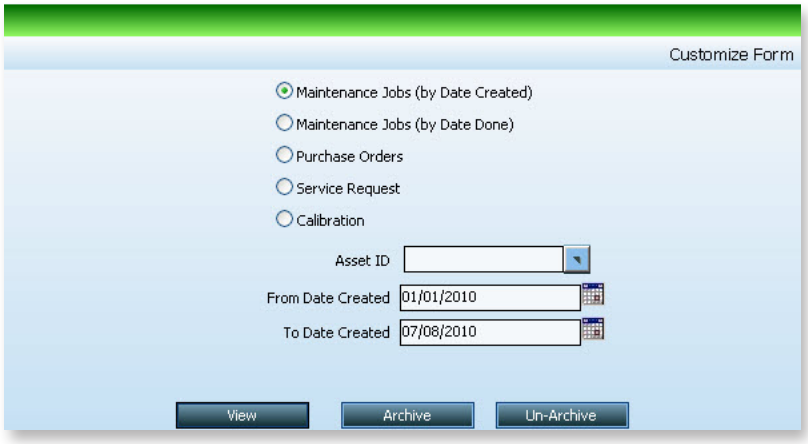


Records Archive

The **Records Archive** utility allows you to archive or un-archive your completed maintenance jobs, purchase orders and service requests, filtered by Asset ID, date created or date completed. This utility can also be run for calibrations when using FaciliWorks 8i Calibration.

Archiving will move your records from the current group of records and place them in a storage location within the database. This makes your current group of records smaller so your database will run more efficiently. An **Archive** is not the same as a **Backup;** a **Backup** preserves your entire database in a separate place and can be restored if your database is lost or damaged. Archived records are not accessible through forms or filters.

Always make a backup copy of your database file before you archive it.



To archive your records, first select the record type by clicking the appropriate radio button.

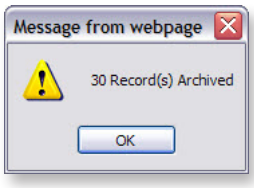
To find records that pertain to a particular asset, enter the **Asset ID** or select one from the **Asset ID** pop-up list.

Enter a date range for the records you want to archive. The types of date fields will vary depending on the selected record type.

Click **View** to view the selected records in a separate window:

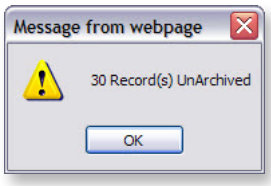
Maintenance No.	Date Created
1234567	12/28/2005
4567678	01/27/2006
4567844	01/13/2006
0000000026	01/27/2006
0000000552	04/06/2006
0000000586	04/25/2006
0000000470	05/22/2006
0000000027	01/27/2006
0000000553	04/06/2006
0000000642	03/30/2006
0000000651	03/30/2006
0000000660	03/30/2006
0000000669	03/30/2006
0000000678	03/30/2006
0000000687	03/30/2006
0000000696	03/30/2006
0000000705	03/30/2006
0000000714	03/30/2006
0000000723	03/30/2006
0000000496	03/30/2006
1 2 3 4 5 6 7 8 9 10 ...	

Click the **Archive** button to archive the selected records and a confirmation message similar to the following will appear:



Click **OK** to return to the **Record Archive** form.

To un-archive records, enter the appropriate information in the filter fields and then click the **Un-archive** button and a confirmation message similar to the following will appear:



Click **OK** to return to the **Record Archive** form.

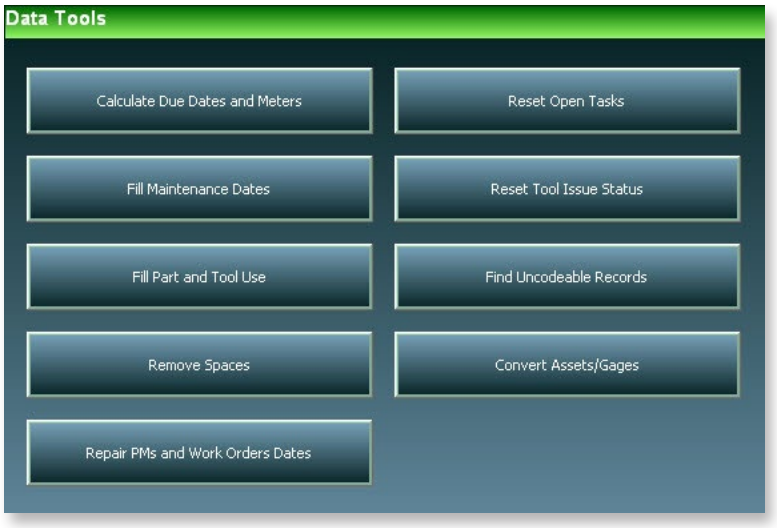
For 8i Calibration, selecting **Calibration** as the record type will change the **Asset ID** field to a **Gage ID** field.

Also specific to the **Calibration** record type is the **View Cal Meas** button. Clicking this button will display calibration measurements for each gage within the filter criteria, sorted by **Gage ID.**

Gage ID	Date	Time	Standard ID	Before	After
COMPARATOR	02/10/2004	01/01/1900	SEE CERTS	0	0
DB-S/N 1	05/09/2003	01/01/1900	+.005" IN BLOCKS	0	0
DI04	01/23/2004	01/01/1900	1. PREC #1	0	0
DI04	01/23/2004	01/01/1900	2. PREC #2	0	0
DI04	01/23/2004	01/01/1900	3. PREC #3	0	0
DI04	01/23/2004	01/01/1900	4. ACCURACY	0	0
DM-00002	05/09/2003	01/01/1900	Width-1/1.0	0	0
DM-00002	05/09/2003	01/01/1900	Width-10/10.0	0	0
DM-00002	05/09/2003	01/01/1900	Width-11/11.0	0	0

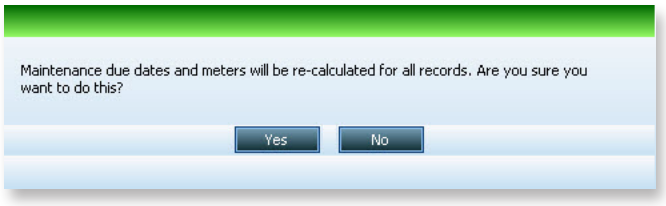
Chapter Seven
Data Tools

The **Data Tools** menu contains utilities that are intended for one-time use. Use these features only when instructed to do so by Technical Support or FaciliWorks documentation (such as manuals or update notices).



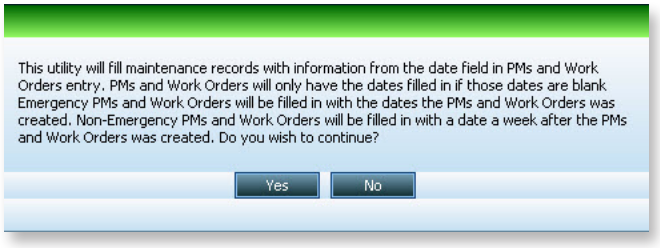
Calculate Due Dates and Meters

This utility recalculates all maintenance due dates. For example, if you change the maintenance frequency for punch presses from 60 days to 90 days and you have 25 punch press records, it would be easier to update the due dates by running this utility than to manually alter each of the 25 records. The following window appears when clicking the **Calculate Due Dates and Meters** button:



Fill Maintenance Dates

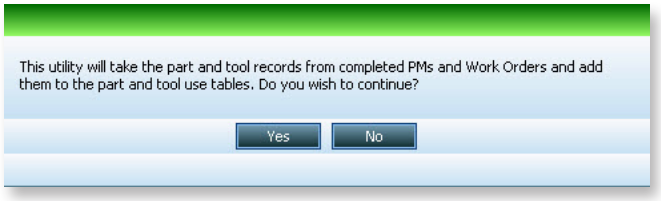
This utility fills in any missing dates for completed work orders. For emergency work orders, FaciliWorks makes both the maintenance due date and maintenance done date the same as the date on which the work order was created. For regular work orders, the program assigns a date of one week after the creation of the work order. The following window appears when clicking the **Fill Maintenance Dates** button:


This utility will fill maintenance records with information from the date field in PMs and Work Orders entry. PMs and Work Orders will only have the dates filled in if those dates are blank. Emergency PMs and Work Orders will be filled in with the dates the PMs and Work Orders was created. Non-Emergency PMs and Work Orders will be filled in with a date a week after the PMs and Work Orders was created. Do you wish to continue?
Yes
No

Fill Part and Tool Use

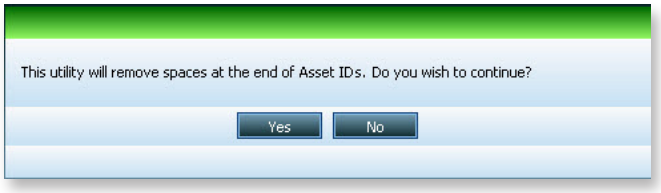
Each part and tool record contains a **Where Used** tab. These tabs list all assets that require the particular part or tool. This information can be entered manually for each part and tool record or click the **Fill from Maintenance Jobs** button in each record to import the data for that individual record.

Use the **Fill Part and Tool Use** utility to fill in all of your part and tool records with the **Where Used** information from all non-archived, completed work orders. The following window appears when clicking **Fill Part and Tool Use:**


This utility will take the part and tool records from completed PMs and Work Orders and add them to the part and tool use tables. Do you wish to continue?
Yes
No

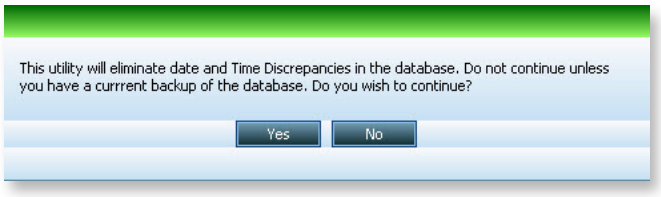
Remove Spaces

This utility should be run once after importing data from another program. This feature removes unnecessary trailing spaces from **Asset IDs** that may have been used by your old program. The following window appears when clicking the **Remove Spaces** button:



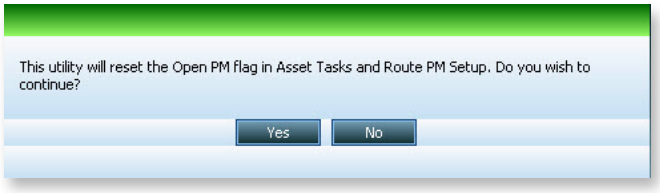
Repair PM and Work Order Dates

This utility checks all of your preventative maintenance and work order records for valid dates and times. If a record is missing one of these fields, the program will insert the required information. The following window appears when clicking the **Repair PMs and Work Order Dates** button:


This utility will eliminate date and Time Discrepancies in the database. Do not continue unless you have a currrent backup of the database. Do you wish to continue?
Yes
No

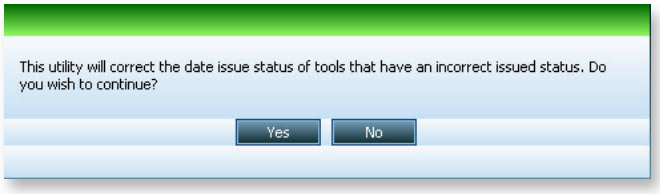
Reset Open Tasks

Use this utility to update the **Open PM** checkbox in each of your task records. This field can also be altered manually from within the **Assets -> Task List -> Information** sub-tab and the **Route Preventative Maintenance Setup -> Asset List -> Information** sub-tab. The following window appears when clicking the **Reset Open Tasks** button:



Reset Tool Issue Status

This utility corrects problems with imported records that show that a tool has been received even though it has not been issued. Do not run this tool unless instructed to do so by Technical Support. The following window appears when clicking the **Reset Tool Issue Status** button:


This utility will correct the date issue status of tools that have an incorrect issued status. Do you wish to continue?
Yes
No

Find Uncodeable Records

In FaciliWorks, you can print barcodes for parts, tools, assets and employees. Run the **Find Uncodeable Records** utility to check all of your ID numbers for parts, tools, assets and employees to see if any of them contain characters that cannot be converted into a barcode. If the utility finds any uncodeable records, it will provide a printable list of them. If no uncodeable records are found, a dialog box will appear to confirm this.

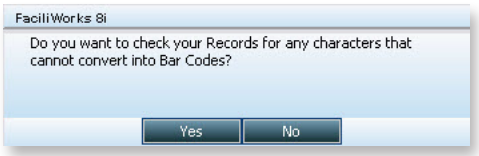
These barcodes are divided into two categories:

1. Code 39 – Under this type, the following are considered valid characters:
    - The letters A-Z, both capital and lowercase
    - Numbers 0-9
    - Special characters: underscore, forward slash, plus sign, period and dash

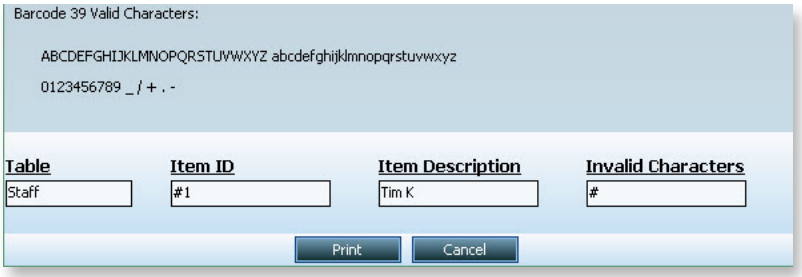
2. Code 128 – Valid characters under this type are:
    - The letters A-Z, both capital and lowercase
    - Numbers 0-9
    - Special characters: underscore, forward slash, plus sign, period, comma, dash, exclamation point, at symbol (@), carat (^), open and close parentheses, equal sign, pipe (|), backslash, colon, semicolon, greater and less than (> and <) signs, question mark and tilde (~)

This function will check the characters found in the **Staff ID** field for all staff records, **Part No.** field for all part records, **Tool ID** field for all tool records and **Asset ID/Gage ID** for all asset/gage records. (Gage records are used in 8i Calibration only.)

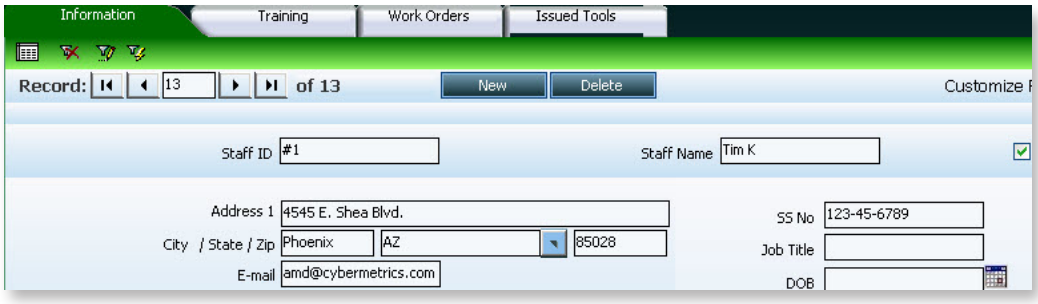
Upon clicking the **Find Uncodeable Records** button, the following dialog opens:



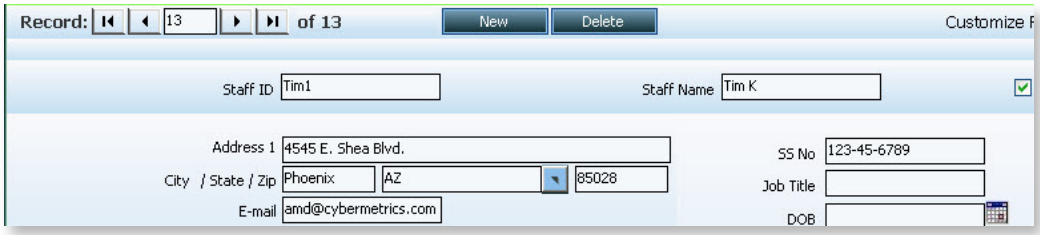
Click **Yes** and FaciliWorks will display the list of uncodeable records (if any exist):



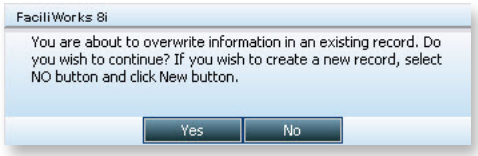
These errors must be corrected manually. For example, to correct the error shown in the example, go to the **Personnel -> Staff Entry -> Information** tab and locate the uncodeable record.



Edit the **Staff ID** field contents, making sure that only valid characters are used.

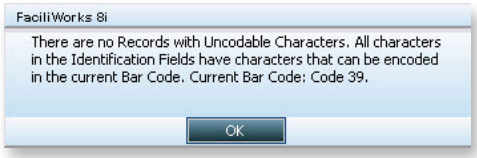


Click the **Save** button and the following dialog will appear:


FaciliWorks 8i
You are about to overwrite information in an existing record. Do you wish to continue? If you wish to create a new record, select NO button and click New button.
Yes
No

Click **Yes** to confirm the action.

Navigate back to the **Data Tools** menu and click **Find Uncodeable Records.** Since the only uncodeable record has been corrected, you will receive the following message:

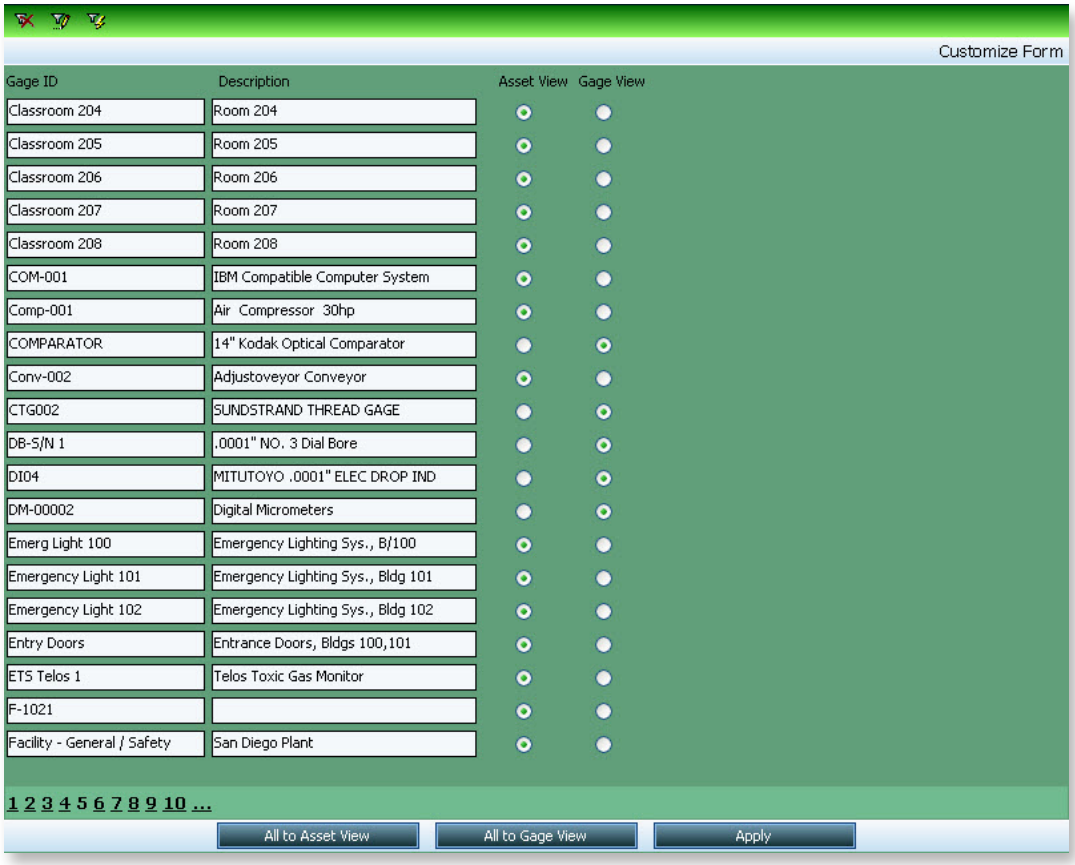

FaciliWorks 8i
There are no Records with Uncodable Characters. All characters in the Identification Fields have characters that can be encoded in the current Bar Code. Current Bar Code: Code 39.
OK

Click **OK** to return to the **Data Tools** menu.

Convert Assets/Gages (for 8i Calibration only)

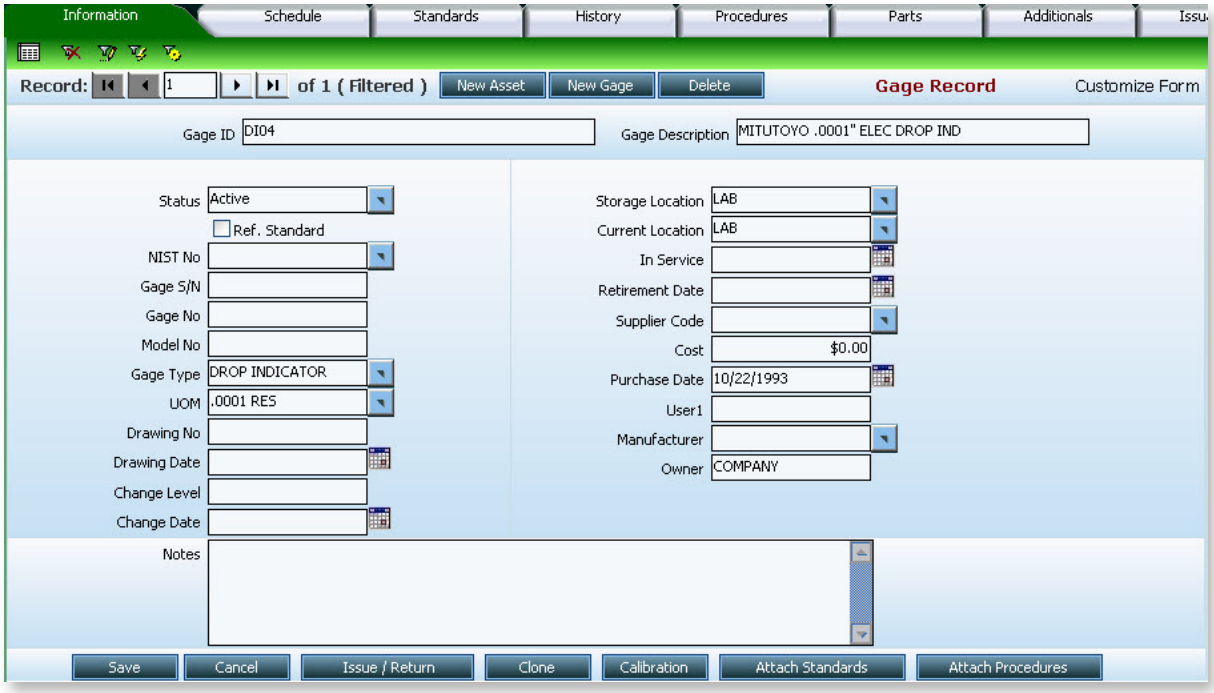
Creating a new asset or gage record is done from within the **Data Administration -> Assets -> Information** tab. Once the record has been created, you can change the way FaciliWorks handles the record, i.e. converting an existing asset record into a gage record.

To do so, navigate to **Data Tools -> Convert Assets/Gages.** To convert an asset record to a gage record, click the **Gage View** radio button associated with the asset and click **Apply.** To do the reverse, click the **Asset View** radio button and click **Apply.** You can use the **All to Asset View** or **All to Gage View** buttons to convert all items to one view or the other. Make the selection and then click **Apply.**

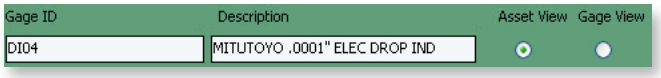


For example, as shown in the image above, record DI04 is currently a gage record.

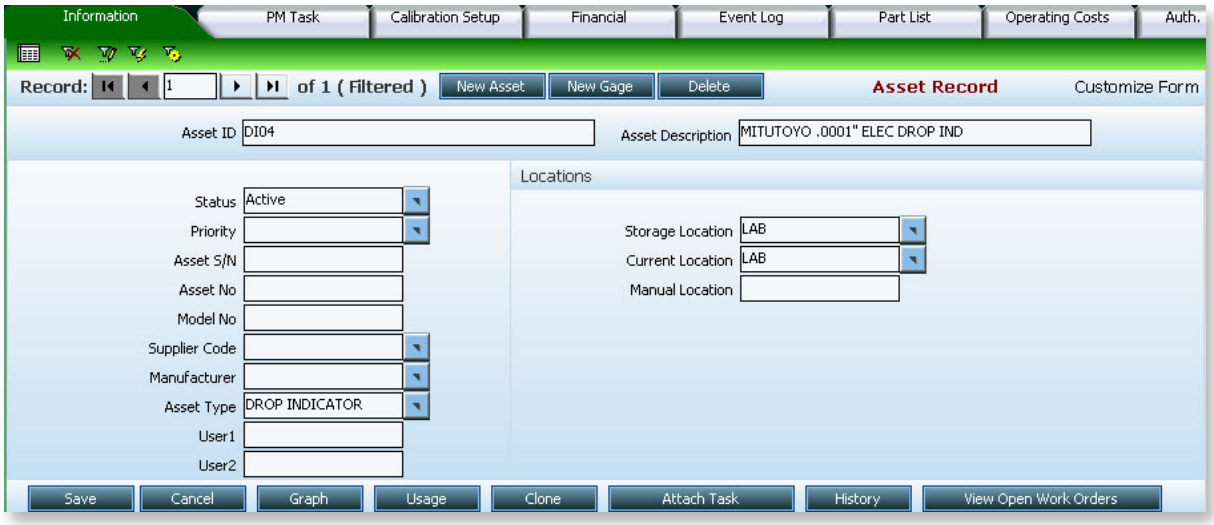
The record's **Data Administration -> Assets -> Information** tab appears as follows:



To convert it to an asset record, navigate to **Data Tools -> Convert Assets/Gages**, click the **Asset View** radio button and then click **Apply.**



The new view of record DI04 would appear as follows:

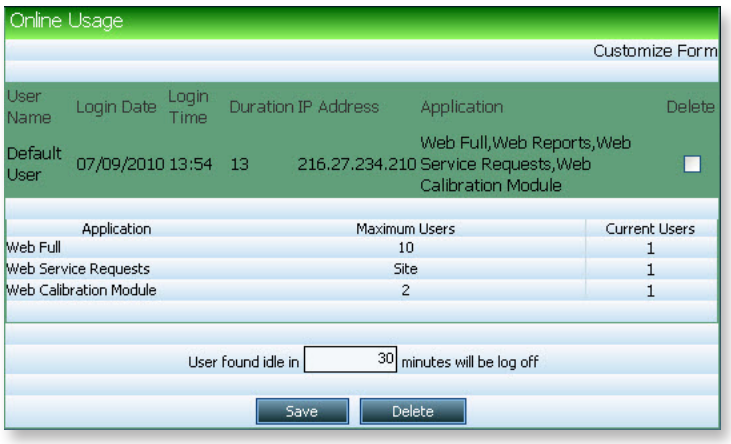


Chapter Eight
System Information

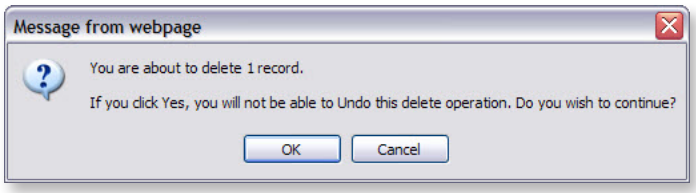
From the Main Menu, select **System Info** to view usage, database and host information.

Usage

Navigate to **System Info -> Usage** to view a list of each currently logged in user, the time at which the user logged in, duration of the current session, IP address and general application access.



As an administrator, you can log a user out of the system by clicking the **Delete** checkbox in the row associated with that user and then clicking the **Delete** button. The following message will appear:


Message from webpage
You are about to delete 1 record.
If you click Yes, you will not be able to Undo this delete operation. Do you wish to continue?
OK
Cancel

Click **OK** to log the user out of FaciliWorks or click **Cancel** to return to the **Usage** form.

This form also shows the maximum number of users allowed in each section of the application as well as a tally of the number of users currently logged in to each section.

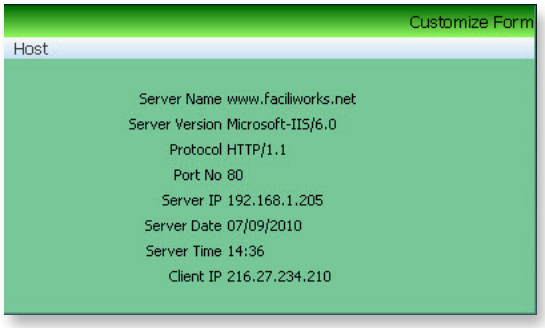
The field at the bottom of the form displays the number of minutes that a user can remain idle within the system before being automatically logged out. The value in this field will override the value in the **User Login Timeout Period Minutes** field found within the **Configuration -> Admin Settings -> Security** tab.

Database

Navigate to **System Info -> Database** to view server and database information as well as the total number of each type of record within your database.

Host

Navigate to **System Info -> Host** to view host server information, such as protocol and port number.



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FaciliWorks® 8i Product Options

FaciliWorks Web Service Requests

FaciliWorks Web Service Requests improve the efficiency of your maintenance department by allowing an unlimited number of users in various locations to quickly create and submit service requests to a central maintenance department, eliminating time-consuming phone calls and written requests, while providing centralized documentation of every service request and its outcome.

FaciliWorks PDA

Perform maintenance and inventory in the field with your PDA handheld computer, then transfer the data back to your FaciliWorks database. You can even add a built-in laser bar code reader to scan labels printed by our Maintenance Label Kit. It's a great way to save data entry time and cut down on costly errors.

FaciliWorks Maintenance Label Kit

Print durable, laminated, bar-coded labels directly from FaciliWorks. The small-footprint Brother printer comes with cables, design software and everything else you'll need to get started.

TaskPro and SafetyPro

TaskPro is a fully customizable, comprehensive database of maintenance procedures covering 250 different topics related to facility and equipment maintenance and easily installs directly into your FaciliWorks database.

SafetyPro is a database of step-by-step safety checklists to assist with OSHA compliance. It covers 40 different topics including fire protection, stairs and stairways, hand tools and just about anything else you might need.

Training

Three convenient and effective training options are available to fit your needs: personalized web training, two-day regional training and on-site training. Our talented instructors will guide you through the planning, preparation, setup and successful operation of FaciliWorks. You'll learn how to save time, avoid common mistakes and get the most out of your software.

FaciliWorks 8i Calibration

Two Powerful Products. One Ground-breaking System.

FaciliWorks 8i Calibration combines all of the benefits of FaciliWorks 8i with the power of our GAGEtrak® software, the world's leading calibration management software, to deliver an all-in-one enterprise asset management server solution. In addition to the asset management functions of FaciliWorks, 8i Calibration allows for gage entry, calibration scheduling, tracking of gage locations, retrieval of calibration records, production of calibration certificates and the ability to track the as-found condition of gages. You can schedule a PM and a calibration on the same asset, assign a gage ID as a standard and attach calibration certificates to procedure records.

Validation Kit

FaciliWorks simplifies the validation process with its backup/restore feature, built-in referential integrity checks, field-level input validation, standard reports and a sample validation database for end-user testing and verification. And, because FaciliWorks 8i can incorporate calibration management, our 8i Calibration Validation Kit supports both CMMS and calibration to meet requirements for single-track FDA validation.

Contact us today to learn how these products and services will further maximize your productivity with FaciliWorks.

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